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ABSTRACT

This handbook was written to help school boards conduct routine business meetings more efficiently, and thereby improve their ability to reach constructive decisions and solve problems. After a brief introduction, the first chapter focuses on organizing the new school board, electing officers, adopting policies, and appointing committees. The second chapter provides advice for planning the meeting and preparing the agenda, while the third focuses on optimum procedures for conducting the meeting. The fourth chapter outlines the duties and responsibilities of the board president, board members, superintendent, and school attorney. Chapter 5 is devoted to procedures for recording the meeting and preparing the minutes for distribution. Chapter 6 discusses the process of making and monitoring two types of school board decisions--policy and problem solving. The seventh chapter discusses methods for dealing with the public at board meetings and for handling complaints or criticisms. Similarly, chapter 8 focuses on dealing with the news media--working with reporters, preparing for news coverage, and handling interviews. The final chapter provides a checklist for evaluating the school board meeting. Appended are five short advisory articles written by members of the Illinois, Georgia, and Pennsylvania School Boards Associations, a quick reference for appropriate motions in various situations, and a suggested reading list for school board members. (TE)

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Successful School Board Meetings

By STUART A. ANDERSON

EA 019 753

Successful School Board Meetings

A special edition for New Jersey school boards

By STUART A. ANDERSON

in collaboration with the staffs of the
ILLINOIS ASSOCIATION OF SCHOOL BOARDS
and the
NEW JERSEY SCHOOL BOARDS ASSOCIATION

New Jersey
School Boards Association

Headquarters: 315 West State Street, P.O. Box 909, Trenton, New Jersey 08605

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FOREWORD

A school board meeting serves several purposes. The official meeting is the only means by which the board can carry out its legal duties or exercise its legal powers. Therefore, the primary purpose of a school board meeting is to transact business.

The board meeting also provides opportunities for creative and constructive decision making and for healthy communications between the school board and its constituents. Before the board can turn to matters of policy development, creative problem solving, and communications, however, routine business must be efficiently completed.

Unfortunately, many school boards have not learned the secret of successful meetings—which usually is nothing more than careful planning as to procedures and subject matter, plus good human relations. As a result, some boards find their meetings drag on interminably, never getting beyond the routine and more notable for their boredom than anything else. Still others find their meetings disrupted by public outbursts that impede the conduct of business, hold the board up to ridicule, and leave many people angry.

Stuart A. Anderson, professor of educational administration at Sangamon State University, Springfield, Illinois, has written this handbook to help school boards become more effective. Originally published by the Illinois Association of School Boards, we have revised and edited it so that the information conforms to New Jersey law and practice.

This handbook is intended to help school boards become more effective governing bodies by:

1) Becoming more efficient in conducting routine business;

2) Improving their ability to reach constructive decisions and to solve problems;

3) Making their meetings a source of good will among members, students, and community; and

4) Developing written policies and procedures for conducting board meetings and following them.

To repeat: the secret is effective planning. There is no magic formula. The board must reach a consensus on what its meetings are supposed to accomplish and how this will be done. Then the members must reduce this consensus to writing—and abide by it.

Successful meetings enable the school board to conduct its business with dispatch and provide the decisive leadership which schools so desperately need today.

Lloyd J. Newbaker
Executive Director
New Jersey School Boards Association

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INTRODUCTION

New school board members come to their first board meetings filled with anticipation and inspiration. A few go home with disappointment.

> I told the board president I wanted our elementary reading program evaluated this month, but nothing's being done.

This new board member's problem is a common misconception about the legal nature of school boards. But it probably won't take long to learn that a school board speaks with one voice—not several. The majority rules, not the individual member.

It is this statutory insistence on group decisions that gives the school board meeting its meaning. The law extends very limited rights to the individual board member. Other than the right to take part in board deliberations and to vote on each motion before the board, the individual member appears to have no special rights beyond those accorded any other citizen.

Although the rights of the individual member are few, they can be potent when the individual understands the bigger picture. The state delegates its real powers to the board as a group. The board member who understands this has the incentive and the impetus to become an effective participant in the decision-making process.

Making group decisions is what bonds the individuals who find themselves thrown together on the school board. They study, discuss and vote on each decision, and then take responsibility for the consequences.

> I'm not too crazy about the decision we finally made; but let's face it, we're all responsible for it now.

Without the need for group decisions, school board meetings would be unnecessary and impossible. Members must cooperate or the board can't carry out its statutory duties. A successful school board meeting is a tribute to the willingness of members to subordinate their self-interests to the needs of the group. Board members soon learn that their individual rights mean little unless the entire board succeeds.

It is this realization that converts the chaos of divergent individual goals into successful school board meetings. Some observers see the successful board meeting as a tribute to individuals serving on the board. Others see it as proof that representative democracy does work.

The law does not—and cannot— regulate the relationship among members of the school board or the behavior of individual members. It is cooperation that produces efficiency in carrying out board duties and wisdom in exercising board powers.

The importance of the law must not be underestimated, however. State laws regulate many aspects of school board meetings. These legal requirements are typically found in at least two areas in the statutes of most states—statutes dealing with schools and statutes dealing with the meetings of public bodies. All states have laws governing school boards; many have laws regulating meetings (so-called "sunshine" laws). School board members must be familiar with both kinds of laws, because these laws go a long way in determining how boards function.

However, these laws usually leave wide areas of discretion where school boards succeed or fail by their own action or inaction. Wise boards fill in those wide areas of discretion with their own policies that set forth rules of procedure for conducting business.

Most states require school boards to adopt and enforce rules or policies. But there is no law requiring a school board to abide by *Robert's Rules of Order* or any other particular rules. There is no law that says the president of the board cannot make a motion or that requires motions to be seconded. There is no law that says a school board cannot set a time limit for its meetings and no law that requires it.

These are among the many procedural consid-

erations that members of each school board must agree on and set down in writing for their own guidance and for the guidance of others who look to the board for leadership.

If all members of a school board were starting from scratch to develop successful meetings, they would be well-advised to look first to the law for directions. They would then examine their own preferences for rules of procedure. Then they would combine their rules with the law in a set of written policies. Finally, they would apply those policies to practice and see how they work.

Few school boards start from scratch. The typical school board meeting is the product of tradition. Rules for conducting meetings are handed down from one board to the next. Tradition is good to the extent that it reflects the needs of each community. Tradition is bad to the extent that it ignores changes in the law, as well as opportunities to do things a little better.

This book introduces the school board member to the basic procedures for conducting school board meetings. It also offers suggestions and alternatives for improved procedures that contribute to efficiency in carrying out board duties and wisdom in exercising board powers.

However, this book addresses state laws only in passing. School boards are urged to work closely with their attorneys in keeping their policies current with state law.

1. ORGANIZING THE SCHOOL BOARD

The new school board

A new school board comes into being following each school board election or seating of newly appointed members. The "new" board reorganizes by electing officers and preparing itself to conduct business.

The board secretary usually acts as temporary chairman for the new board, unless someone else is selected.

Oath of office

NJSA 18A:12-2.1 states that "each member of a board of education shall, before entering upon the duties of his office, take . . . an oath that he possesses the qualifications of membership prescribed by law and that he will faithfully discharge the duties of his office . . ." Each new member is also required to take the following oath from 41:1-3 of the Revised Statutes: "I do solemnly swear (or affirm, as the case may be) that I will support the constitution of the United States and the constitution of the state of New Jersey, and that I will faithfully, impartially and justly perform all the duties of the office of board of education member according to the best of my abilities and understanding. So help me God."

Election of officers

School boards must elect their own officers, usually a president and a vice president. Their terms of office are one year.

The president of the board is the first officer to be elected.

Nominations need not be seconded. If only one member is nominated, the board secretary is instructed to cast a unanimous ballot for that member, who is thereupon declared elected. If two or more members are nominated, the election must be by open vote.

Following the election of a president, boards elect a vice president.

Both the president and the vice president play key roles in the effective functioning of the school board. Individuals selected for these positions should be fully aware of the responsibilities involved and possess the requisite skills. **See Chapter 4.**

Absence of officers—If the president is absent from any meeting or refuses to perform his duties, the vice president will preside.

Adoption of policies

It is generally understood that school board policies continue in force until rescinded. Therefore, it is recommended that a board take formal action on its policies each year.

It is important for every board of education to plan for a regular review of its policies for a number of reasons. Policies spell out ground rules for board operations and provide the superintendent and other staff with directions for running the schools on a day-to-day basis. Policies, therefore, must be up-to-date in terms of current law, current needs, and the thinking of the current board.

Another reason for regular review and formal action is to clarify what is board policy and what is not. In making decisions that establish precedents, school boards sometimes, in effect, adopt policies in their minutes but neglect to include them in their policy manuals. Then as the membership of the board changes, or as a change occurs in the central administrative staff, the policy statement in the board minutes is forgotten, and the board relies solely on the policy manual.

This may prove disastrous if an employee or student is able to produce old minutes which have not been revoked and which contain policies conferring either substantive or procedural rights.

Sample Policy One presents a series of sample "policies on policies" from development through dissemination.

Exhibit A—Code of Ethics

New Jersey School Board Member

Code of Ethics

1. I will uphold and enforce all laws, state board rules and regulations, and court orders pertaining to schools. Desired changes should be brought about only through legal and ethical procedures.
2. I will make decisions in terms of the educational welfare of children and will seek to develop and maintain public schools which meet the individual needs of all children regardless of their ability, race, creed, sex, or social standing.
3. I will confine my board action to policymaking, planning and appraisal, and I will help to frame policies and plans only after the board has consulted those who will be affected by them.
4. I will carry out my responsibility, not to administer the schools, but, together with my fellow board members, to see that they are well run.
5. I will recognize that authority rests with the board of education and will make no personal promises nor take any private action which may compromise the board.
6. I will refuse to surrender my independent judgement to special interest or partisan political groups or to use the schools for personal gain or for the gain of friends.
7. I will hold confidential all matters pertaining to the schools, which, if disclosed, would needlessly injure individuals or the schools. But, in all other matters, I will provide accurate information and, in concert with my fellow board members, interpret to the staff the aspirations of the community for its schools.
8. I will vote to appoint the best qualified personnel available, after consideration of the recommendation of the chief administrative officer.
9. I will support and protect school personnel in proper performance of their duties.
10. I will refer all complaints to the chief administrative officer and will act on such complaints at public meetings only after failure of an administrative solution.

May 10, 1975, Delegate Assembly, New Jersey School Boards Association

Appointing committees

Although committees usually are not required by law, many school boards appoint committees to expedite their work. However, a committee cannot be empowered to act for the board; its authority is limited to making recommendations or advising the board. The board has no authority to delegate its discretionary powers even to a committee of board members. Committee action does not become official until the board approves it at a legal meeting. A written board policy on committees should be established.

Standing board committees

Some school boards maintain permanent committees assigned to deal with such matters as finance, board procedures, policy development, collective bargaining, buildings and grounds, and other functions. These committees typically consist of two or three board members.

Obviously, certain tasks and projects can be handled satisfactorily by committee or the committee system would not continue to exist. Many board members contend that committees save time and reduce the burden on the superintendent.

Few observers argue with the value of temporary or *ad hoc* committees created to tackle major projects (discussed later). The value of many standing committees is questionable, however. Many of the functions assigned to standing committees are functions that could be handled with greater dispatch by the superintendent or other staff members. Consequently, standing committees put burdens on board members that might more properly be put on the professional staff.

It is admirable when board members are willing to assume these extra duties, but their productiveness is highly variable. For example, a committee assigned to develop policies or plan a program might accomplish an important task that would otherwise not get done. However, a committee assigned to supervise financial matters or buildings and grounds might simply add an unnecessary layer of bureaucracy that delays

Sample Policy One—Board Policy Making

Policy Development

The Board of Education shall develop policies which shall provide the framework for District operation. The administration shall operate the District within the framework of these policies.

Adoption of new policies or changes to existing policies is solely the responsibility of the Board.

Proposals for new policies or changes to existing policies may be initiated by any Board member, by the Superintendent, or by any citizen of the District. Members or organizations of the staff may initiate consideration of policies which will be processed through regular administrative channels. The proposals shall be made in writing to the Superintendent and shall be placed on the agenda of a regular or special meeting for consideration.

The Superintendent (or his designee) shall be responsible for recasting group consensus about policy recommendations into acceptable written form for further deliberation and/or action by the Board.

The Superintendent shall seek the counsel of the school attorney when there may be a question of legality or of proper legal procedure in the development of a proposed Board policy.

Policy Adoption

Policies or policy revisions considered by the Board shall not be adopted at the meeting at which they are introduced.

Further consideration shall be given at one or more subsequent meetings before action is taken.

Temporary approval, however, may be granted by the Board in lieu of formal action to meet emergency conditions or special events which will take place before formal action can be taken.

Policy Dissemination

The Superintendent shall establish an orderly plan for preserving and making accessible printed copies of the policies adopted by the Board of Education.

Policies adopted by the Board will be filed in the administrative office of the District and made available for public inspection during regular office hours.

important day-to-day decisions.

There also is a tendency on the part of some standing committees to assume for themselves authority that belongs to the board as a whole. Standing committees also have been known to interfere in administrative duties, causing unhealthy friction and confusion as to who is responsible for what.

The value of standing committees, therefore, depends on how board members and the superintendent perceive their roles and their relationships to one another. Some superintendents will enjoy sharing their responsibilities with a committee; some will not.

In considering whether to create a committee, the school board should ask itself these two questions:

1) Is this a duty calling for action by the full board?

2) Is this a task that can be handled more appropriately by the administrative staff?

Some of the problems associated with standing committees can be avoided by changing personnel once a year. This at least reduces the tendency of committees to assume inappropriate authority.

Ad hoc committees

There are times when an *ad hoc* or temporary committee can prove useful, provided it is established for a specific purpose and with a predetermined life-span. After the committee has made its report and recommendations to the full board, it should be thanked and disbanded. The decision to create a special committee should be made jointly with the superintendent to be sure roles and responsibilities are clear and to avoid duplication of effort.

Citizens committees

At one time or another nearly every school district has a need for involving the community in setting a difficult goal or policy or making a critical decision. Creating and working with citizens advisory committees has become an art-form that is beyond the scope of this book. (**See Appendix G** for sources of information.) It must be noted, however, that the role of any committee must be purely advisory to the board (or to the administration). Legally binding decisions may be made by the board of education only. Committee members must understand the advisory and temporary nature of their role from the outset.

Helping the new member get on board

A machine does not function efficiently with parts missing. A school board does not function efficiently with members who are not prepared to contribute. A school board, therefore, has a moral obligation to itself and to the community to help the newly-elected member become a contributing part of the board team.

The new board member, of course, faces an awesome task in acquiring the vast array of factual knowledge, conceptual understanding, and interpersonal skills that characterize the productive school board member. In addition to individual effort the task calls for teamwork, and many school boards establish regular procedures for getting the new member "on board" as rapidly as possible. Workshops sponsored by school board associations or other agencies can help the inexperienced board member become familiar with lawful duties and powers, school finance, and other broadly applicable matters. Much of the knowledge a board member needs, however, is available only at the local level in the form of policies, financial statements, minutes of past meetings, board operating procedures, organization plans, and the like.

Depending upon the amount of other pressing business before the board, the initial organization meeting may not be too early to begin the orientation of new members. Certainly it is not too early for the board to publicly review its written policies or procedures and plan a schedule of training sessions for the new members. **See Sample Policy Two.** (New Jersey School Boards Association holds annual Orientation Confer-

Sample Policy Two-
New Board Member Orientation

It shall be the responsibility of the Superintendent to provide to new members, immediately upon their election, copies of the Board Policy Manual, the minutes of the Board meetings for the previous year, and other materials which will acquaint them with the powers and duties of the Board of Education and the operation of the school system.

The President and the Superintendent shall arrange for new members to visit with the Superintendent, with other members of the staff, and with other Board members.

New members shall be encouraged to attend workshops for new Board members conducted by school board associations, as well as meetings of such organizations.

Orientation to the job should be considered an ongoing process for all Board members and a vital responsibility for effective Board membership.

ences. These weekend seminars are designed to give new board members a broad overview of their responsibilities. In addition, NJSBA's New Board Member Local Orientation Packet provides self-help activities and materials to enable new members to become familiar with the workings and philosophy of their *own* district—its board and administrators.)

Training and orientation sessions for new school board members need not involve all members of the board, although even the most experienced veteran should find the "refresher course" helpful. Typically, the superintendent and board president work most closely in orienting the new member, with help as needed from other board officers and members and other administrators.

Some school boards take steps to ensure that new members come on board with early preparation; others have found innovative ways to make new member training useful to a wider audience. Consider the following for example:

1) Plan one or a series of orientation sessions with board candidates before the election. The winning candidate will be a jump ahead in the learning process. In addition, the campaign is more likely to focus on worthwhile issues as candidates make use of the accurate information they have acquired.

2) Where possible, make formal presentations open and appealing to as many people as possible. Some school districts develop slide presentations to orient new board members and invite the public to view it, too.

School boards function properly only when members are knowledgeable. It doesn't pay to cut short the education of board members, especially those new to the job.

See the article in **Appendix A** for some useful ideas on how to help new board members and get all board members working as a team.

Complying with Sunshine Laws

School board meetings must be planned and conducted in compliance with so-called "open meetings" or "sunshine" laws. The public policy is that meetings of all governmental bodies, including school boards, must be conducted openly. This means:

- all meetings must be held at times and places convenient to the public;
- the public must receive advance notice of meetings;
- a quorum must be present to conduct business;
- minutes must be kept.

The law prohibits board members from discussing board business among themselves other than at legal meetings, but provides for closed meetings to discuss certain specified topics (such as employee dismissals or collective bargaining).

Individuals assigned to draft school board policies on meetings must be fully informed regarding the sunshine law. Boards should consult their board attorney regarding all aspects of the sunshine law.

2. PLANNING THE MEETING

The agenda

The successful school board meeting depends upon a well-planned agenda. An agenda saves time by clarifying the tasks before the board, preventing unfortunate surprises, and fostering the orderly conduct of business.

The agenda reflects how the board and superintendent view their respective roles and responsibilities. A school board that delegates to its superintendent the authority to manage the district and holds him responsible for results will find that its agenda includes primarily policy decisions as action items. Administrative matters may be found on the agenda as items of information, but rarely if ever for board action. A board that makes administrative decisions will find its agenda crowded with routine problems related to daily operations.

What is policy and what is administrative in nature is subject to varying interpretation. Each school board and superintendent must decide the kinds of decisions that each should make. A careful look at the board agenda will tell them whether they are sticking to their agreed-upon roles—or whether the board is making too many routine decisions—or whether major policy decisions are not being brought before the board.

Preparing the agenda

Most school boards assign to their superintendent and/or board secretary the responsibility for coordinating the preparation of the agenda. The superintendent probably has handled this responsibility satisfactorily—and the meeting will run smoothly—if:

- the agenda reflects the major issues needing school board action;
- preparation of the agenda involves board members, the staff, interested citizens and organizations;
- board members receive the agenda and related materials at least three days before the meeting.

In this capacity, the superintendent occupies a powerful "gatekeeping" position. The agenda is prepared by the superintendent and his staff in consultation with the board president. Individual board members should inform the board president or the superintendent of items they wish to have included; they should be encouraged to suggest additional items. The agenda and supporting documents, consisting of factual data and reports, should be distributed to board members at least three days (72 hours) in advance of the meeting to provide ample time for study. Many boards include the minutes of the previous meeting.

The superintendent begins developing the next agenda the day after a board meeting with a review of unfinished business. He may keep a running file of activities and events to be reported or acted upon at the next board meeting. Many superintendents meet with the board president to plan the agenda for the upcoming meeting. Another typical procedure is for the superintendent and his administrative staff to meet one week prior to the board meeting and plan the agenda. Some superintendents prepare an informational letter to accompany the agenda.

An overloaded, haphazard agenda can be dangerous. Too many items should not be squeezed into a single session. As executive officer of the board, the superintendent should screen matters which various persons and groups are sending to the board. Some matters require administrative disposition and can be handled by the superintendent in line with board policy.

It is recommended that a deadline for agenda items be established, probably one week before the next board meeting. Late items, except in an emergency, should be saved for the next board meeting rather than jammed into the agenda at the last minute. Neither should fresh material litter the board table at meeting time.

It also is recommended that the superintendent and other responsible staff members go through the agenda prior to the meeting in an effort to anticipate and prepare for any problems or questions that might arise.

Recurring business

School board meetings address a wide variety of matters, many of which occur at about the same time each year. Usually the superintendent and the board secretary develop a schedule of the board's major obligations for the year ahead. In this matter, deadlines can be anticipated and met on time. State law determines a number of the dates; the board adds its own dates for meetings and a variety of personnel matters. Local circumstances create additional deadlines. A review of board minutes over the past several years will suggest a list of recurring items and the dates when they must be considered. Keeping a complete record for one year will serve as a basis for planning the master calendar for the following year. The "Master Calendar" will prove useful in identifying items for the agenda.

Some interesting insights into a yearly agenda are provided by the executive vice president of the Georgia School Boards Association in **Appendix B.**

Format of the agenda

The general format of the agenda for regular meetings should be established cooperatively by the superintendent and the board. Although school board agendas tend to be quite similar, each school district should adopt a format that will meet its needs.

It is advisable to keep *action* items clearly separate from *information* items in the order of business. For example, "old" or "unfinished" business should contain those items which the board has discussed or studied at earlier meetings and is ready to vote upon. "New" business may contain emergency items calling for board action as well as items which the board will discuss for the first time but vote on at a subsequent meeting.

Here is one typical format:

1) Call to order
2) Roll call of members
3) Approval of minutes
4) Communications and petitions
5) Visitors
6) Report from superintendent
7) Old business
8) New business
9) Adjournment

An alternate method clearly segregates items calling for school board action from those intended merely to keep the board informed:

1) Call to order
2) Approval of minutes
3) Visitors and communications
4) Action items
5) Information items
6) Unfinished business
7) New business
8) Adjournment

Here are two more variations:

1) Opening of meeting
2) Approval of minutes
3) Communications
4) Hearing of delegations
5) Committee reports
6) Superintendent's report
7) Old business
8) New business
9) Adjournment

1) Call meeting to order
2) Call roll
3) Establish a quorum
4) Approve minutes
5) Hear communications to and from the board
6) Hear communications of individuals
7) Accept the superintendent's report
8) Deal with unfinished business
9) Deal with new business
10) Bring up any miscellaneous matters
11) Adjourn

When an agenda format has been agreed upon, board policy should call for a majority vote in order to alter or temporarily suspend the order of business.

Additional ideas on agenda development are presented in **Sample Policy Three.**

Locating agenda items

It is considered good practice to dispose of routine items early in the meeting. Also, action items probably should occur before information items, recognizing that people have a limited concentration span. People are usually livelier and more creative at the beginning of a meeting than at the end. So if an item demands considerable thought, it probably should be taken care of before energy levels drop.

At the same time, if it seems likely that one topic might dominate a meeting, it may be better to hold it awhile and get some other priority work accomplished first.

Problems are created when a board spends too

much time on small emergencies and gives short shrift to important, long-range subjects.

Supporting documents

Superintendents are properly expected to make policy recommendations to the board. The board needs comment and advice from the administration on every agenda item. These comments and advice can be in the form of the superintendent's letter or an administrative staff memorandum. Although the board may act otherwise, having the superintendent's recommendation—together with supporting documents—sharpens the issues, provides precise wording for certain motions and resolutions, and speeds action at the meeting. Recommendations should be stated in language that can be incorporated into motions; they should offer the exact wording of motions where possible.

The superintendent in a small district probably will write most of the supporting documents for action items on the agenda. In larger districts, the commentary on each subject may be written by the administrator in charge of that area of school operation. Usually, such writing should represent the superintendent's viewpoint. When a viewpoint going to the board is independent of the superintendent—such as from an advisory committee, consultant, or employee union—the superintendent should also give his views either orally or in writing.

Other enclosures

A variety of reports of every description may be enclosed with the agenda. These documents flow into every board office in a heavy stream. The superintendent is responsible for their screening and distribution: some go into the waste basket; many are diverted to other administrators; many are sent to the board. When the enclosure relates to an action item on the board agenda, the superintendent will need to provide an explanation. Some enclosures are sent without interpretation when they are merely for the board's information.

Enclosures fall into two broad categories: those originating within the school system, such as reports from principals, department heads, the head custodian, the board secretary, or the treasurer; and those originating outside the system, such as reports, letters, and requests from government agencies, community committees and organizations, and individual citizens. All should be prepared in the weeks preceding the meeting. Copies can be collected and held in reserve long before the

Sample Policy Three—Board Meeting Agenda

The agenda for Board meetings shall be prepared by the Superintendent in consultation with the President. Items submitted by Board members to the Superintendent or the President shall be placed on the agenda. Others may convey suggestions for possible inclusion on the agenda. Such suggestions must be received by the Superintendent at least one week prior to the Board meeting.

Items for discussion or action may be added to the agenda at the start of any regular meeting at the request of the Superintendent or any Board member upon majority approval of those members present.

Copies of the agenda shall be mailed or delivered with adequate data and backup information to each Board member at least 72 hours prior to each regular meeting.

Board members shall be expected to read the information provided them, and to contact the Superintendent to request additional information that may be deemed necessary to assist them in their decision making responsibilities.

Copies of the agenda shall be available at the meeting for the convenience of visitors.

The order of business at regular Board meetings shall be:

1. Call to order.
2. Roll call.
3. Approval of minutes of previous meeting.
4. Financial report.
5. Approval of bills.
6. Committee reports.
7. Report of Superintendent.
8. Recognition of public.
9. Communications to Board.
10. Unfinished business.
11. New business.
12. Announcements.
13. Adjournment.

Upon consent of a majority of members present, the regular order of business at any meeting may be suspended.

agenda is completed. The enclosures can be organized and collated for mailing with other material.

Priority goes to the reports and requests which provide background for board decisions. They must be included with the meeting material in every case. Next in importance comes material which informs the board about the impact (results) of its policies, then those which will need action in coming weeks, and finally those which improve the board's overall understanding of education and its own functions. If time is running out and some reports cannot be finished soon enough for the meeting, they should be worked on in the above order and leftovers postponed until the next meeting.

It takes time to teach good agenda-making procedures to the staff, to the public, and to individual board members. At first, the effort to plan ahead may seem unnecessary, but as time passes and the board finds itself gaining more time to discuss important issues with the staff and with the public, the value of a carefully planned agenda will become evident.

Distributing the agenda

School systems employ a variety of agenda distribution plans. The agendas are mailed to the board members, newspapers, radio and television stations, and representatives of interested employee and citizen groups and presidents of the local PTAs on a Thursday or Friday, for example, of the week prior to a Monday or Tuesday board meeting. Some deliver them by hand or through messenger service. Agendas also are posted in school buildings and copies sent to all school administrators in the system. Of course, the agendas should be delivered to the board members before they are released to the press or any other recipient. The board and the superintendent should jointly determine who will receive copies of the agenda and supporting materials.

Most school districts rely upon newspapers and radio publicity through general news releases to inform the public about meeting topics.

The meeting room

Governmental bodies must meet at specified times *and places* that are convenient to the public. Most school boards specify a meeting room that is part of, or adjacent to, the district's central administrative offices. Some board meeting rooms are specially designed for meetings. Some double as conference rooms for the staff, while others are an extension of the superintendent's office. Boards in many small districts meet in cafeterias, multi-purpose rooms, or other settings

The popular decision is to vote no on the motion, the just decision is to vote yes, the easiest way is to abstain, and what I'd really prefer to do is adjourn.

that serve other uses when the board is not in session.

All of these sites comply with the law because they are convenient to the public and they are specified when the board announces its schedule of regular meetings. Apart from the question of public convenience, the place where the board meets is important because physical arrangements can affect the conduct of business.

Because of the range in the sizes and resources of school districts, it is difficult to recommend "the ideal" physical facility for the board meeting room. However, administrators and board members charged with the responsibility for providing this facility should recognize the importance of the board meeting environment.

Some of the general considerations include:

1) Parking facilities should be ample, well-lighted and close.

2) There should be ready access to school records (minutes book, budget documents, policy manual and administrative rules and regulations), and State statutes.

3) Coat racks should be adequate and conveniently located; they may be permanent or moveable.

4) Restrooms should be readily accessible.

5) The room should be large enough to comfortably accommodate everyone who attends, including the normal provisions for board members, staff, news media people, and whatever audience is typical for the district. In the event of an unusually large crowd, a larger facility located near the board room should be available.

The physical setting can contribute heavily to the tone of the meeting. The room should be well lighted, ventilated, and kept at a comfortable temperature. Consideration should be given to the color scheme and appointments. A comfortable,

pleasant atmosphere should prevail. Wall-to-wall carpeting improves both the appearance and the acoustics.

The board meeting room should be comfortable, but not sumptuously furnished. Seating arrangements for visitors should be comfortable. Visual aids that are frequently used—such as wall charts, district maps, overhead transparencies and filmstrips—should be easily accessible.

Everyone present should be able to see and hear others in the room. The board and the superintendent should be seated where they can be easily seen by the audience. The table at which the board members sit should be large enough so that they can spread out their papers. Comfortable chairs, water, ash trays, large-type name plates, scratch pads and pencils should be provided for each member. In a large room a public address system should be provided with sufficient microphones so that each board member can be heard. A floor microphone and a lectern may be provided for public participation.

A variety of seating arrangements are in practice. There is considerable interest in seating arrangements which permit maximum visibility to the audience. Most boards sit in an open alphabet arrangement facing the audience (board table shaped in U, T, V, or I).

Various seating arrangements, along with their advantages and disadvantages, are illustrated in **Exhibit B.**

The major criteria for selecting a seating arrangement should be:

- Can the audience see and hear all members of the board?
- Can all members of the board establish eye contact with one another?

Improved sight and sound can be obtained in some board rooms by elevating the board table on a platform or stage.

Careful consideration also should be given to the news media. They should be made to feel welcome and be provided with the necessary facilities to do their work: a comfortable chair at a table at the front of the room, pencils, paper, ash tray, and drinking water. Coffee and other refreshments should be conveniently available. A complete agenda plus copies of relevant background materials also should be provided.

Security

When a large crowd is expected to attend a school board meeting, some common sense security measures are in order. Citizens coming on school district property are, in a sense, the guests of the school board and are entitled to reasonable efforts to provide for their safety. Moreover, where a controversy is involved, the board may want to ensure its ability to maintain order and conduct the business at hand.

Security measures, of course, will vary from community to community. Here are some items for boards to consider:

1) Steps should be taken to ensure that buildings and grounds are safe and well-lighted.

2) A member of the administrative staff may be assigned responsibility for knowing emergency telephone numbers—ambulance, hospital, police, fire department, or para-medical services.

3) The police department may be requested to have personnel on hand throughout the evening or the board can hire special security staff for this purpose.

4) Every member of the board should be aware that, in desperate circumstances or as a last resort, the board president can and should obtain police assistance to maintain order. Such occurrences are so rare that a board anticipating any difficulty would be well-advised to have its attorney on hand to ensure that the board is on sound legal ground in obtaining police assistance.

Planning interesting meetings

School boards are often portrayed as dealing only in dull matters that have little to do with students and learning. And it's true that boards are required to perform numerous duties holding little or no interest for the average citizen.

Unfortunately, some boards never get beyond the routine, the ministerial, or the trivial. The few people who attend the meetings of such boards find the proceedings about as interesting as watching grass grow.

On the other hand, the boredom of routine ministerial actions would probably be welcome to the school board that's constantly beset with controversies and pressures from special interest groups. School boards experience such a wide variation in public response that some boards are trying to attract more people to their meetings while other boards are privately wishing more people would stay home.

The problem facing the majority of school boards is that the tone of their meetings is set by people and forces other than the board itself. The typical school board reacts to whatever drama unfolds once the meeting begins. However, those boards that choose to do so find they are able to establish and maintain a positive tone for their meetings no matter what topics or problems might come up. Part of their formula for successful meetings lies in adopting and following effective rules of order. Another part of their formula consists of an effective presiding officer. Still another part is

skillful communications planning.

Recognizing that the best defense against boredom and chaos alike is a good "game plan," some boards and their administrative staffs consciously set a positive tone for each board meeting. While every board agenda includes problems that have to be solved and duties that have to be performed, school boards concerned about their public relations find ways to accentuate the positive. It helps, of course, if someone on the board or administrative staff has a flair for showmanship—namely, the ability to plan public presentations in a way that entertains and gets a message across.

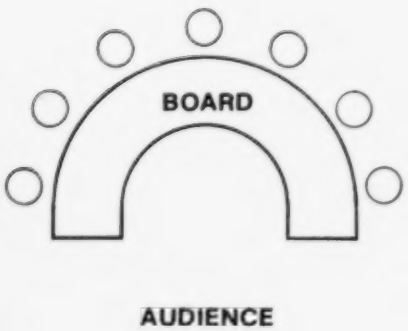
Here are some examples:

1) Focus on programs. Have staff members explain the benefits or results of an instructional program. Use charts, slides, film strips, or whatever props might help demonstrate the program.

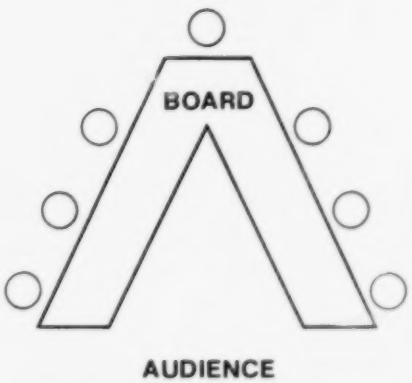
2) Focus on students. Involve students in ceremonies to open the meeting (e.g., present the flag, Pledge of Allegiance). Call attention to top students with awards or stage an old-fashioned spelling bee. Take every opportunity to recognize commendable performance by individuals or groups.

3) Focus on teachers and other staff. People like

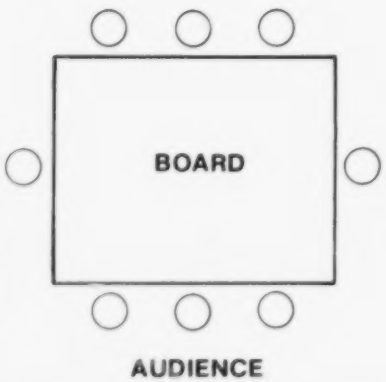
Exhibit B—Seating Arrangements for Board Meetings



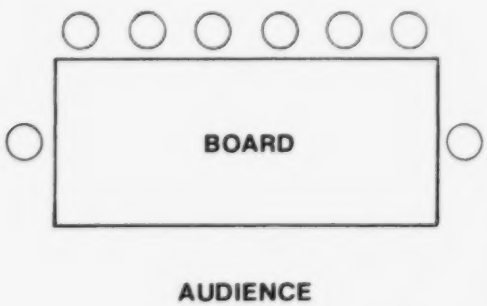
This arrangement is perhaps ideal; the audience can see each member of the board, yet board members can speak directly to one another with good eye contact.



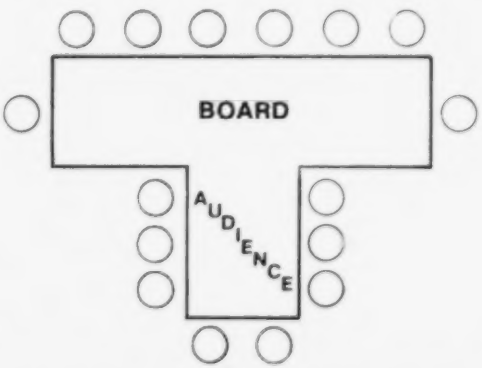
This variation is also close to ideal. The difference is in the V-shaped table, which retains good eye contact among board members as well as between the board and the audience.



Encircling a table probably establishes the best eye contact among members, but it isolates the audience. It's useful for boards that attract no visitors to meetings.



Putting board members along one side of the table opens the meeting up so the audience can see and hear. However, eye contact among members is made more difficult. Board members speak to the audience and not to one another.



Tables arranged in a T may be useable with a small audience. However, eye contact among board members is not good with this arrangement, and some members of the audience may forget they are there to observe, not deliberate.

to know what's going on in the classrooms—and board members need to know, too. Some teachers are truly gifted at explaining what they are doing and why it's good for students.

4) Displays. Some boards go to great lengths to set up exhibits of student work, school projects, effective programs, or explanations of important concepts (bus routing, if that's important locally). The exhibit can be briefly explained or discussed at an appropriate time during the meeting. Moreover, such exhibits can then go "on the road" to businesses, clubs, churches, and other locations to reach an even wider audience.

5) School board honors. A successful school district represents the efforts of many people, salaried and non-salaried. Nothing could be more positive or do more to dramatize the school board's values and priorities than giving frequent thanks to those who serve the schools. Citizen volunteers and employees alike deserve recognition for dedicated service. A special time on every agenda can be reserved for honoring individuals who are retiring, members of advisory committes, and parents who help out at school. Gestures ranging from trophies and plaques to simple resolutions are no doubt equally appreciated if presented with a sincere statement of gratitude.

Whatever devices a board might select to focus on the positive at meetings, there are several keys to success:

1) Select topics for special programs that people want to know about. This means careful listening to the questions that people ask. Some school districts use opinion surveys. Focusing on things that people don't care about is a major source of boredom and leads school officials to wrongly conclude that people are apathetic. People are not apathetic about schools. They just see things from a different angle than do professional educators.

2) Publicize special events at board meetings and work at building public interest in them. There is very little in this world that sells itself.

3) Put the special event near the top of the agenda. This not only sets a positive tone for everything that follows, it won't force people to sit through routine board business that they don't care about. (To say that all citizens should be interested in budgets, buses, bills and bond issues is idealistic, but not very realistic.)

4) Don't overdo it. The special event should be to the point and long enough to get across its message. But it should not force the board to meet beyond a reasonable hour of adjournment. Boards that regularly use special events may not get by with just one meeting a month.

See **Appendix C** for more tips on using the board meeting as a public relations tool.

3. CONDUCTING THE MEETING

Establishing a quorum

School board business may be transacted only at lawfully constituted regular or special meetings. There appears to be no specific limitation in most states as to the business that can be conducted at a regular meeting. A special meeting may be limited to items listed in the agenda accompanying the official notice.

The transaction of business requires the presence of a quorum, which is a majority of the board membership. for a seven-member board of education, at least four must be present.

If a quorum is present, the board may proceed to the business at hand. If a quorum is not present, a meeting cannot be held. Once the roll call is completed, the presiding officer declares that a quorum is not present and adjourns the meeting. Business must await the next meeting.

Methods of action

Most matters coming before a school board are acted upon following a motion and a second. The substance of the motion is generally stated orally and written into the minutes by the recording secretary.

Deliberating proposed actions

On issues requiring board action, most school boards require that a motion or resolution be properly introduced before engaging in discussion.

Requiring a motion prior to discussion is one way to speed-up the meeting, because it quickly identifies what the discussion is about and tends to prevent digressions.

Voting

A school board takes action by voting. If the minutes of the meeting do not show the results of a formal vote, no action was taken in the eyes of the law.

When there is a motion on the floor, and sensing that productive discussion has run its course, the president calls for the vote. As a member of the board, the president also is expected to cast a vote on each motion. The prevailing vote represents the decision of the total board, even if the margin is 4 to 3 or 2 to 1.

Vote required to carry a motion—When a vote is taken on a motion before the board and a quorum is present, a majority of the votes of the members voting "yea" or "nay" determines the outcome. In the event of a tie vote, the motion is lost.

Boards should adopt a policy stating what an abstention will be counted as. It can be counted as a "yes" vote, as a "no" vote, as included with the majority, or as no vote at all. Since a member usually abstains because of a conflict and thus does not want his vote to count anywhere, it would seem to be best to write a policy stating that an abstention is not to be counted as a vote at all. Lacking a policy, the Commissioner of Education or the courts may be the final arbiter of what that abstention meant. Since this could change the intent of the voter, it is in the best interest of the board to have a written policy on the subject. That policy would hold before any court.

Roll call votes—Practices vary regarding the use of roll call votes. State law requires a roll call vote, with the vote of each member recorded in the minutes, on all motions involving the expenditure of money.

Many boards use roll call votes on all important issues simply because they want such information entered in the minutes. A show of hands or voice vote saves time, of course, on routine motions.

Voting order—The board should establish a sequence for voting. One possibility is for the board secretary to call names alphabetically. Under this arrangement the same sequence is followed on all votes—Mr. Adams votes first and Mrs. Zielinski votes last. Both Mr. "A" and Mrs.

"Z" may feel a bit uncomfortable in these permanent positions. A possible solution would be to move down the alphabet on each vote so that the voting begins and ends with a different board member each time. Another plan would be to vote sequentially around the table; again, the first and last member could be changed with each motion.

It is mandatory for all members present to vote on a motion. They may vote "yea," "nay," or "abstain."

Rescinding a board action

A school board usually may rescind action it has taken unless, by reason of that action, persons have acquired rights which would be prejudiced if the action were nullified. However, it is not legal to rescind or alter a board action simply by rewriting the minutes that recorded the action. The board must vote on a new motion rescinding the earlier action.

To avoid having to deal with the same issue over and over, many boards require the following steps to rescind an action:

1) A motion to *reconsider* the earlier action must be introduced by a board member who had voted with the majority on the original question.

2) If the motion to reconsider is adopted by majority vote, then the president may entertain a second motion to rescind the earlier action.

This two-step process avoids confusion by addressing the concern of board members who may question whether the matter should be reconsidered at all.

Striving for agreement

On critical issues, such as the employment of a new superintendent or the decision to hold a tax referendum, many boards strive for a unanimous vote. A new superintendent needs to begin the new job with support from the entire board. A split vote on a decision to hold a referendum for a new building or a tax increase could guarantee the proposition's defeat. (If the board is less than 100 percent behind a critical need, how can taxpayers be expected to support it?)

On such issues, it is recommended that both sides compromise by moving to a middle ground where everyone can stand. Strive for consensus rather than majority rule, even if it means adopting everyone's second choice.

Unanimous votes supporting the superintendent's recommendations on routine agenda items may be typical, but not essential. Board members should vote their individual consciences on all matters, rather than form a coalition and vote alike on all issues. Political factions can be damaging to effective board operations. A 4 to 3 vote is not a problem unless the same persons vote as a block on most issues. A skillful board president will strive for a consensus, getting a motion on the floor that all—or nearly all—can support. For some constructive suggestions in this regard, see **Chapter 6** and the article in **Appendix A.**

Parliamentary procedure

Although *Robert's Rules of Order Newly Revised* (Scott, Foresman and Company) provides a systematic method of conducting school board meetings, a local school board may establish its own procedures for carrying out its business, so long as the procedures are in compliance with state laws.

For example, a board may adopt a rule which permits the president to make or second a motion without leaving the chair, a rule that motions not require a second, and other procedures which meet its needs and wishes. A board of education can operate quite informally—and effectively—so long as it agrees on these procedures and incorporates them into its written policies.

The following guidelines may prove helpful in writing such procedures:

1) A board should agree on and adopt an agenda format that it will follow at regular meetings.

2) Action items on the agenda require:
- a motion by a board member;
- a second to the motion (required by most boards, but not all);
- a discussion of the motion by board members;
- a vote by board members.

3) Each motion should be limited to one idea or issue.

4) No new motion may be made while another is being discussed.

5) A motion may be amended and votes on the amendments must be taken before acting on the original motion.

6) Before a vote on a main motion is taken, business can be interrupted by a motion:
- to table the main motion;
- to postpone action;
- to refer the motion to a committee;
- to withdraw it from consideration;
- to adjourn the meeting.

These subsidiary motions must be disposed of prior to action on the main motion.

7) Debate can be closed formally with a motion to move the question and a two-thirds affirmative vote.

8) When the president senses the discussion has ended, a vote may be taken without a formal

motion to close debate unless a member objects.

9) Some motions are not debatable, such as a motion to adjourn or to appeal a decision to the chair. See the "Quick Reference for Appropriate Motions" in **Appendix D.**

10) A member—but no one else—may rise to a point of order at any time. After the point is stated, the president issues a ruling which may be appealed to a vote of the full board. Board policy should specify the number of votes required to over-rule the president or to suspend a rule.

11) Before a motion is voted upon, it should be read aloud by the secretary.

12) The president, by virtue of membership on the board, is expected to vote on each issue before the board.

13) The president should indicate before each vote whether a simple or special majority is required.

14) The president should keep readily at hand a reference guide, such as the one in **Appendix D.** For unusual problems, *Robert's Rules of Order Newly Revised* also should be available.

It should be noted, however, that in his 1973 book, *Parliamentary Procedure: Tool of Leadership,* King Broadrick offers this advice which can be applied to school board meetings:

> Slavish dedication to parliamentary law "is likely to be nonproductive if not actually disruptive . . . you are soon in trouble if you interpret the manual literally. The hazard of literal and legalistic interpretation is that it will tend to make procedure more prominent and thus more important than the substantive issues under discussion."

A regular meeting scenario

When the president calls a regular meeting to order, much of the work should already have been done. The administrative staff has compiled information regarding each item of business and distributed it to members of the board. Members should have studied the material in advance, know the questions they want to ask, and begin to form their views by the time the meeting starts. (It's good practice for board members to reserve final judgment on issues until the full board has an opportunity to deliberate.)

Each school board is free to establish its own order of business and rules of order, but the following scenario is more-or-less typical of how a board might deal with routine business.

1. **Call to order**
   President (rapping for attention): "The meeting will now come to order."

2. **Roll Call**
   President: "The secretary will call the roll."
   The secretary is required to record in the minutes the names of members present and those absent. If a quorum is present, the board proceeds to the business at hand. If not, no business can be legally transacted and the meeting must be adjourned.

3. **Approval of the minutes**
   President: "Are there any corrections or additions to the minutes?"
   At this point a member is free to suggest any changes that may be more in accord with the facts or other changes in the interests of clarity or accuracy. If not, approval of the minutes is usually done informally, although a formal motion is in order. To save time the president may state: "The minutes will be approved as read" (or "as written," or "as corrected," or "as amended," as the case may be).
   (Note: Most school boards save a great deal of time by having minutes distributed with the agenda packet, eliminating the need to read them at the meeting.)
   The minutes must always reflect the truth and must state exactly what action was taken. Any action of the board may be reviewed, reconsidered, reversed or rescinded by vote on a new motion. Failure to approve the minutes of a meeting does not rescind any previous action, because the sole purpose of the minutes is to relate what happened. Failure to approve the minutes cannot change what actually occurred. Neither may any board action be rescinded nor altered by amending or correcting the minutes because the minutes would not then truthfully state the facts. **See Chapter 5.**

4. **Approval of current bills for payment.**
   Any member: "I move that the current bills as read (or "as shown on the list submitted") in the amount of $ _____ be approved, so entered in the minutes, and orders drawn for their payment."
   Another member: "I second the motion."
   President: "Is there any discussion?"

The most common practice is to distribute a list of bills with the agenda packet. Board members can examine the list and direct inquiries to the bookkeeper or business office in advance of the meeting. Meeting time can be reserved for discussing only those bills that present difficulty or disagreement.

Some board members feel it is not productive to haggle over the current bills because bills have to be paid anyway. However, members should satisfy themselves that the expenditures have been authorized by general board policies or specific

board directives. (Board policies typically authorize specific administrators to make purchases of specific types or within specified amounts.)

School boards that do not have sophisticated business departments also find it worthwhile to challenge what appear to be excessive charges for goods or services. However, trained administrators should be in the best position to evaluate the fairness of bills before they are presented to the board for payment.

5. Report of the superintendent.

As the chief executive officer of the board, the superintendent should be called upon to make regular monthly reports. Many of the issues or problems he presents may have a direct bearing on decisions to be made in connection with the committee reports which follow.

The superintendent also may present to the board communications from any accrediting or governmental agency. This would include, for example, reports received from the State Board of Education, the State Department of Health, or the regional accrediting organization. Also, any communications or reports from local organizations which have demonstrated their interest in public education and their desire to coordinate their efforts in a constructive way with the school district should be presented to the board by the superintendent at this point in the meeting.

6. Reports of committees.

President: "We will now hear the report of the _____ committee."

The president of the board calls for a report from each committee chairman, standing committees first, if any; then any special committees that may be at work. If the committee chairman is not present, the president may ask a member of the committee to report.

Not all school boards use standing committees, of course. *See page 11.*

Any committee recommendations or proposals calling for school board action should be presented later—expressed in proper motions—under "New Business" or "Action Items." Where a committee report includes a motion for board action, some boards prefer to hold the entire report until the action portion of the agenda.

Probably the most effective procedure, however, is to receive the committee's report and recommendations at one meeting and put the matter on the agenda of a subsequent meeting for action. Members of the board need and deserve time to consider any new proposal, unless it is minor or an emergency.

Many boards, by policy, require that important issues be presented as new business at one meeting and voted upon as old business at a subsequent meeting. A committee report can fall into this category, depending upon how much time board members need to study the matter.

If the committee report simply provides information and includes no recommendation for action, of course, no vote is required.

7. Public hearings and petitions.

President: "We have with us tonight (naming the individuals or organizations waiting to be heard) who wish to present a matter for consideration by the board."

The president may indicate the nature of the business if he knows what it is.

Occasionally individual citizens or committees representing service and civic organizations request to be heard at meetings of the school board in order to present some matter on which action by the board is desired. The school board, by policy, may require that such requests be made through the secretary of the board or the superintendent and that the nature of the matter to be presented be indicated on the agenda.

While the board usually is under no legal compulsion to grant such hearings, it is generally conceded to be a part of good government and good public relations to afford individuals and organizations every reasonable opportunity to make their desires known and express their views. To what extent the board shall give ear to these expressions of views and petitions is for its members to determine. (**See Chapter 7.**) It is likewise a matter for the board to decide what action, if any, is warranted or desirable after the petitioners have been heard. Most boards, by policy, reserve action until a later meeting.

8. Notices and communications.

Petitions and special requests are occasionally received through the mail. These or any other communications which might properly be considered by the board as a whole should be read at this time. (To save time, communications can be distributed with the agenda and the oral report eliminated.) Should any matter presented warrant action, the proposal should be embodied in an appropriate motion under "New Business."

9. Unfinished business.

President: "Is there any old or unfinished business that should come before the board at this time?"

Unfinished business includes:

- any business pending and not disposed of at the preceding meeting, unless laid over by regular motion and vote for consideration at some other specified time, or
- matters previously postponed by regular motion and vote and set ahead for consideration at this meeting.

10. New business.

President: "We are now ready to consider new business which may properly come before this meeting."

The agenda should list items of new business coming before the board for deliberation and possible action. The agenda or supporting material should include the superintendent's recommendation for handling each item. It is frequently appropriate to refer new business items to the superintendent or a committee for further study prior to final action at a later meeting.

Under "New Business" the board also considers motions resulting from requests and petitions presented earlier in the meeting.

11. Announcements.

President: "Has the superintendent any announcements to report?"

This may include a call for a special meeting of the board, announcement of special school events, parent-teacher meetings, civic meetings, school board association workshops, or similar news.

12. Adjournment.

President: "If there is no further business to come before the board, the meeting stands adjourned."

The meeting also may be adjourned upon the passage of a motion to adjourn made by one of the board members.

13. Adjourned meetings.

Discussion of a particular item of business often cannot be completed at the one meeting. Perhaps additional information is needed before action is taken. However, if the matter cannot wait until the next regular meeting, a motion to adjourn and convene again at a specified time and place may be permitted by state law.

4. DUTIES AND RESPONSIBILITIES

The board president's responsibilities

The board president's most visible responsibility is to preside at meetings. The president plays a key role in the successful operation of a board of education meeting. He sets the tone and climate for the meeting through fair, reasonable, and impartial treatment of all board members. A good sense of humor is a genuine asset. When board meetings deal with highly controversial issues, when a discussion of a routine matter suddenly becomes charged with emotion, or when an irate speaker makes derogatory remarks about the board or superintendent, the ability of the president to remain calm and keep the meeting under control is essential. **See Exhibit C.**

The board president also should possess basic skills in presiding, know parliamentary procedure (but not be overly formal in its application), and understand the legal aspects of public meetings to ensure compliance with the law.

In addition to all the above, the president should vote on all issues. The president is elected as a member and is expected to vote.

While the president is expected to vote on all matters which come before the board, some restraint is necessary in order to maintain the impartiality demanded of the chair. The president should not attempt to unduly influence the board. For this reason, some board policies require the president to relinquish the chair to a president *pro tem* in order to make or second a motion. (This should be rare.) The president should not return to the chair until the motion is disposed of.

Because emotions are contagious, the board president should project a positive and enthusiastic attitude at board meetings. Lethargy and indifference also are catching. He must learn to subjugate personal feelings and maintain a consistent attitude—one that provides stability. As presiding officer, the president is a facilitator who not only controls the meeting but, more important, creates an environment for decision making. He should not dominate the meeting, but should give every member a reasonable opportunity to speak, debate, or challenge the rulings of the chair. No president should be offended by a challenge and should immediately, in accordance with parliamentary procedure, ask that his ruling be voted on by the entire board. In order to meet these demands, the president must do his homework and be well informed about each agenda item.

Before each meeting, the president should confer with the superintendent to determine potential trouble spots, learn whether any other people will be on the agenda, and review any items which may need additional information.

The president should establish a businesslike tone for the meeting by sticking to the agenda and the time allocation for each item. The meeting should start on time, keep moving, and adjourn at a reasonable hour. Late arriving board members who discover that the meeting has begun will soon catch on. On the other hand, punctual members also catch on if meetings never start until ten minutes after the announced time. This means meetings risk being delayed longer and longer.

Private conversations and digressions among board members should be avoided at the board table. The president must stay in command of the meeting, keep the discussion on the topic, and control the length of individual comments.

When discussion on an agenda item exceeds a reasonable time, the president should consider postponing a decision until after further study.

The school board should have written policies and procedures for conducting board meetings, and they should be strictly followed by the board president. Policies and procedures pertaining to school board meetings should be reviewed annually, and desired changes should be made at that time.

See Appendix E for some insights into differences in "presidential style."

Selecting a president

There are various ideas about who should be president and how frequently re-appointed. Some boards regularly rotate this position among the membership. Other boards expect the most senior

Exhibit C—Tips for the Board President

Here are some helpful tips for the school board president. They come from Michael McHamee, president of the school board in Laramie, Wyoming, and were reported in the July, 1980, issue of *The American School Board Journal.*

- Encourage the superintendent to come to you with any problems he might have. Neither he nor you should wait to address problems until they come up at public meetings.
- Keep other board members informed about special issues and problems, and insist they keep you informed about their concerns.
- Direct everything possible through proper channels, and avoid taking on any matter until you consult your policy covering that issue.
- Know the difference between policy (the board's responsibility) and administrative procedures (your superintendent's responsibility) and help the rest of the board make this distinction during and between meetings.
- Make sure all board members receive adequate background information on agenda items before school board meetings.
- Conduct all meetings—both public meetings and executive sessions—using good parliamentary procedure. This can help avoid lawsuits, bad feelings, and misunderstandings.
- Keep meetings moving to prevent board members from becoming sidetracked on an extraneous issue. Give board members and the audience a chance to voice opinions, but keep the statements by both limited to the subject being discussed.
- Know when board members are ready to act on a matter and when they need more time to debate. This knowledge comes from both experience and instinct.
- When you call for a vote, state the issue you are voting on immediately beforehand to make sure there's no chance of confusion.
- Announce results of all votes. Avoid secret ballots.
- Shield board members, administrators, and teachers from personal attacks at meetings by calling persons attempting to make such attacks out of order.
- Remember board members are the only members of the school community legally empowered to make school policy decisions. Resist attempts from outside groups to usurp that power.
- Discuss as much business as possible in open meetings. Executive sessions should be kept to a minimum.

or longest serving member to assume the position. Still other boards have been led by a particular member for so long that it apparently doesn't occur to them that someone else should assume the position. Year after year they automatically return the same person to the presidency.

Quality of leadership should be the determining factor in deciding how long a person should continue to serve as the board's president. There should be no assurance or divine right that any individual will be elected or re-elected. Neither should tenure automatically be for one term if a person is providing satisfactory leadership. A school board that has a good president should keep him as long as he is willing to serve. School boards should not play "musical chairs" with the board presidency. The practice of taking turns or using longevity to determine the board's presidency is a sad commentary on the board's respect for leadership. The presidency should not be a "popularity contest."

Some writers are of the opinion that the presidency should not be in the hands of one member too long. They argue that it is in the best interest of the board, the public, and the school district to have a change in leadership on a fairly regular basis.

Among the characteristics to look for in a good president:

1) The president typically speaks for the board and should be able to subordinate his personal views and represent those of the collective board.

2) The president must be adept at communicating with the news media. Because the majority of the public does not attend school board meetings, most people rely on news media coverage of school board meetings for their information. The extent and quality of that coverage can be greatly improved by the president who properly, openly, candidly, and honestly deals with the media.

3) The president must be a person who avoids playing one member or group against another. At times it may be tempting to do so to pursue a particular goal. On certain issues where there is a divided board and strong feelings, it is difficult to rise above these differences and reach a majority conclusion.

4) The president must be a leader but not so far ahead of the other board members or constituents as to appear to abandon them or their interests. The president personifies the board. If he is good,

the board will be viewed as good. If the president is weak or ineffective, the public will view the board in that light.

The board member's responsibilities

The major responsibility of each board member is to be prepared. This means studying the agenda and supporting documents. Any questions or need for more information should be referred to the superintendent before the meeting. (There should be no surprises at the board meeting!) If a board member has received a complaint or is dissatisfied with the agenda, he should call the superintendent prior to the meeting and try to resolve the problem. A board member who is not thoroughly prepared may be embarrassed at the meeting and cause needless delay in reaching decisions on agenda items.

The board should devote most of its time to major issues and policy discussion and strictly avoid conversation, discussion, or debate with members of the audience; members should not "play" to the audience. A school board member does not represent a particular area, interest or group. Each member must work for the welfare of all the children in the district and base decisions on what is best for the total community rather than a particular area, vested interest group, or organization.

School board members should demand information before voting on a tough issue—or more time to study the matter. Board members, of course, must feel comfortable with their votes.

Some other important responsibilities for the individual board member include:

- Keep an open mind in board deliberations; be prepared to compromise where possible to reach a decision the entire board can support;
- Respect the confidentiality of privileged information that is made available in closed meetings or in written material from the superintendent; leaking information to favored friends violates the trust of both the board and the individuals whose reputations might be harmed;
- Don't be afraid to ask questions when you don't understand or to ask "why?" when you don't know the reason for something.

For more insights into the responsibilities of the individual board member, see **Appendix A.**

The superintendent's responsibilities

Before the board meeting, the superintendent should meet with the board president to review the agenda, clarify any points of concern, and provide a list of people who have asked permission to address the board and the subjects of their interests.

Also prior to the meeting, the superintendent should meet with the top administrative staff. At this time the completed agenda is distributed and plans made for staff participation in presenting items.

During the board meeting the superintendent's involvement will depend on the nature of the agenda items and the expectations of the board. His role must be clearly spelled out in the board policies and procedures manual. The superintendent should not dominate board meetings, of course. His chief roles are to coordinate the preparation of the agenda and carry out decisions made at the board meeting.

The superintendent should not be expected to repeat orally at length what he has already written and mailed in advance. However, he can clarify complicated matters to the public, as well as the board. Other staff members should speak at meetings only at the request of the superintendent. (If the superintendent is to be held accountable, board communications with the staff must be through the superintendent.) However, wise superintendents "share the glory" with appropriate staff members by involving them in presentations at board meetings.

During the meeting the superintendent should write notes about action taken by the board which will require his attention. The next morning he will then be ready to initiate action.

The school board attorney

Few school boards are able to function without ready access to legal counsel. The job of the school administrator, too, is fraught with a growing number of legal pitfalls.

Most boards, however, find they do not need an attorney in attendance at all meetings (although some do). Rather, matters needing legal study are referred to counsel through the superintendent or the attorney is asked to be on hand whenever a particular matter makes it advisable. In any event, each school board should have a policy that sets forth how it will fill its needs for legal assistance. Board members need to know how they will select and work with an attorney.

Working with the attorney—A school board attorney should have extensive background in school law and be able to work easily with the superintendent.

Attorneys typically advise administrators and school boards in areas of student and teacher rights, implications of court decisions and interpretations of statutory, administrative and constitutional law. They also represent the school district at due process hearings and at hearings before the State Board of Education and other

governmental bodies.

Should your attorney attend every board meeting? That's probably not necessary, unless the district is extremely large or involved in an unusual situation. However, the attorney should be kept informed of school problems. Crises often can be avoided by regular communication with the attorney; his advice may steer the board or administration away from an unwise course of action.

Obviously, different school districts establish different relationships with their attorneys. **Sample Policy Four** presents some of the options. Here are some of the choices each board must make:

• **Compensation**—Some boards pay retainer fees at regular intervals for specified services, plus additional charges for extra services (such as representation in a law suit). Other boards pay for each service separately, either at an hourly rate or an agreed upon case-by-case fee. Perhaps the major consideration is that the attorney be readily available when the superintendent needs legal counsel regarding an administrative decision or when the board requests a legal opinion.

• **Requests for service**—It is essential for board members, administrators, and the attorney to know who is authorized to make use of the attorney's time. Some school boards channel all communications to the attorney through the superintendent. A principal who needs legal advice on student records, for example, goes to the superintendent. The same applies to the school board. Under such an arrangement, most attorneys will not advise individual members of the board or staff. Where compensation is on an hourly basis, some form of prior authorization by the board is essential to assure the attorney that he will be paid—either a blanket policy or a resolution authorizing someone to consult the attorney and obligating the board to pay for the service.

Selecting an attorney—The choice of a competent school attorney, or course, is of utmost importance. Here are some guidelines developed by the Whitewater, Wisconsin, School Board, as reported by the Wisconsin Association of School Boards in *Wisconsin School News:*

1) Appoint a subcommittee consisting of the superintendent and several board members to develop and implement a set of procedures.

2) Contact all law firms in the district's area to determine their interest in being considered.

3) Send out a survey questionnaire to all those indicating interest (see below).

4) Interview those firms returning the completed questionnaire.

5) Recommend to the full board the names of the two or three law firms which should be considered further, and invite those firms to meet with the full board.

6) The full board decides on the firm it wishes to retain and so notifies the firm.

The school board's questionnaire could include the following headings:

1) Resume of firm

2) What preparation and experience has your firm had in the following areas:

- School district organization?
- School district meetings and elections?
- School district building programs (contracts, bonding, etc.)?
- Public employee bargaining (mediation, factfinding, impasse)?
- Negotiating for management?
- Litigation and lawsuits against school district personnel?
- Teacher dismissal suits?
- Students' rights, rules, and regulations?

Sample Policy Four—
The School Attorney

An attorney shall be selected annually by the Board of Education to serve as the legal advisor to the Board and the Superintendent. The school attorney shall be employed on a retainer to be determined in advance.

The attorney shall:

1. When requested by the Superintendent or Board President, serve as counselor to the Board at regular meetings and special meetings.
2. At the request of the Board, represent the district in litigation to which the Board may be a party or in which it may have an interest.
3. Render a written opinion on any legal question when requested by the Superintendent or Board President.
4. Approve, prepare, or supervise the preparation of all legal papers and instruments executed by the officers of the Board, and perform such other legal duties as the Board may request.
5. Be available for phone consultation as requested by the Superintendent or Board President.

The Board shall retain the right to consult or employ other attorneys on matters of special concern, or to terminate an attorney on retainer with an appropriate adjustment in the retainer fee.

NOTE: A school board may find it advisable to use two or more firms for different areas of the law. The firm preferred for union bargaining may not be the firm preferred for construction programs.

3) What agreement with the school district would your firm suggest as to retainer fee and other costs?

4) Availability. How does your firm feel about availability to the school board president, board members, superintendent, school administrators? Can you suggest a structure as to how you would prefer to work with the above? Would you be available for the school board meeting?

Application of this method will enable a school board to select an attorney based on indications of interest by law firms in the area, adequate information about each firm, interviews with the finalist, and discussion and vote by the full board, laying a firm groundwork for a good long-range relationship between board and legal counsel.

5. RECORDING THE MEETING

The purpose of minutes

A school board can transact business or take official action only by majority vote at a legal meeting. When the meeting is over, what assurance does the board have that its votes will actually set official actions in motion? The answer: The minutes of the meeting.

An important concept for board members to keep in mind is this: "The school board speaks only through its official minutes. If it isn't in the minutes, the school board didn't do it."

Minutes of the school board meeting, therefore, represent a good deal more than an historical record of who said what. They represent the only evidence that a board performed its lawful duties and did so in the manner prescribed by law.

Because board minutes have the status of legal documents, it is essential that they be accurate and complete.

Courts look to the minutes in deciding disputes. Important actions of the school board, such as the expulsion of a student or the dismissal of an employee, call for the guidance of an attorney. It follows that the record of such actions—including the wording of any motions or resolutions—should be prepared with legal counsel.

Recording the minutes

State law does not specify the detail in which the minutes must be kept. Therefore, practices vary. Some boards keep minutes that are probably too detailed (often quoting the comments of individual board members), while others may not record enough information.

Board meeting minutes should be as brief as possible, but must provide a clear and accurate record of each board action. Lengthy discussions may be briefly summarized, but motions and resolutions must be carefully worded and appear in the record exactly as the board acted upon them.

Documents that the board acts upon—such as budgets, written plans, lengthy resolutions, and the like—need not be repeated in the minutes. They can be incorporated in the minutes by reference to a clearly distinguishing title and/or indexing number. Then the related document must be kept on file in order to make the record of the board's action complete. The minutes need to properly identify the document and where it is filed.

All the board's resolutions, awards of contracts, approval of executive actions, and other actions should be numbered consecutively in chronological order of occurrence. Marginal notations or brief subject titles can be used to indicate the location of the more important items. They will be useful in searching for specific actions.

The stenographic notes from which the minutes are prepared should be preserved for a limited time. A year or two should be sufficient.

Disposition of a motion

The minutes should record the manner of disposing of each motion before another motion is made and recorded. This does not apply to subsidiary motions pertaining to the motion before the board, such as motions to amend, substitute, or table. Any unrelated motion is out of order when a motion is before the board. If the presiding officer does not remember that a motion is before the board, it is the duty of the secretary or other member to remind him that such is the case.

The words "Passed" or "Carried" following the statement of a motion in the minutes are not sufficient, except for a motion to adjourn or motions considered to be of minor importance. On important business motions, the notation should be "Carried unanimously," if such is the case. If the vote is divided and there is a poll of the members, the votes of the several members should be recorded.

Each separate action should be recorded in the minutes in one or more separate paragraphs.

What minutes should include

School board meeting minutes should include at least:

1) The date, time, and place of the meeting;

2) The members recorded as either present or absent;

3) A general description of all matters proposed, discussed or decided, and a record of any votes taken.

The minutes of each school board meeting also should include the following:

1) Clearly identify the school board by district name.

2) A statement that a meeting was called to order, by whom, the hour, and whether the meeting was a regular, organization, reconvened, or special meeting. If it is a special meeting, a copy of the official notice and agenda should be incorporated directly or by reference.

3) Following the listing of members as present and absent, there should be a statement that the president declared a quorum present.

4) Statement of action taken for approval of the minutes of the last regular and any special or other meetings that have been held since the last regular meeting.

In addition, most board meeting minutes will include some or all of the following:

1) Notation of any board members who arrive late or leave early, including a record of the time.

2) Notation of presentations from delegates or visitors who have oral communications or petitions to present, along with a record of any actions by the board referring such matters to committees or to the superintendent for study.

3) Statement of written communications and petitions read, such as those from churches, service clubs, parent-teacher groups, teacher organizations, pupil groups, or individuals, and a record of any subsequent action. Each document should be dated.

4) Record of hearings and actions on reports by committees and members of the board.

5) Record of hearings and actions on previously requested reports from administrative officers, such as the business manager, the architect, the athletic director, or the school nurse. If written, the reports may be numbered and filed as documents and reference made to them in the minutes by file and document number.

6) Record of the presentation of—and action on—reports of the superintendent.

7) Record of motions and actions on unfinished business taken from the table by the board.

8) Record of motions and actions on matters of new business.

9) Record of any motion to close the meeting to the public and the times at which the meeting was closed and re-opened. Separate minutes of the closed session must be recorded.

10) Record of the motion to adjourn.

Type of meeting—The minutes should open with a statement as to whether the meeting is a regular, adjourned or special meeting; the time (date and hour) and place of the meeting. If it is an adjourned meeting, the minutes should show the date of the meeting from which the adjournment was taken.

If the minutes pertain to a special meeting, the call or notice of meeting should be included in the minutes by reference or by attaching a copy. This will counter any attack upon the legality of the meeting.

Where it is necessary that a notice of a meeting be posted in compliance with state law, a copy of the notice as posted, together with a certificate or affidavit of the person who posted the notice stating where and when it was posted, should be filed with the minutes.

Approval of minutes

It is advisable that the minutes be approved at the next regular meeting of the board, so that any inaccuracies may be corrected promptly. Minutes must accurately reflect what happened. A board cannot amend its previous actions by amending its minutes, although many actions can be rescinded or revised by subsequent actions.

Amendments to minutes

A board may amend its minutes at any time to conform to what in fact occurred at a given meeting. Amendments may be made to the minutes even though the membership of the board has changed and a long period of time has elapsed. However, the board may not amend its minutes so as to change the action taken. It may only change the record of such action in order that the record may correctly reflect what transpired at the meeting.

Indexing of minutes

Because minutes of school board meetings are official records, each school district is responsible for maintaining these records for a number of years. It is important that the school district devise some system for indexing the minutes of its school board meetings. Usually the minutes are filed in a minute book with numbered pages, bound annually, and placed in a convenient location. A chronological index, arranged by meeting dates, is developed each year and bound with the

official copy of the minutes for that period.

In addition, a more meaningful, topical or subject index is recommended. The needs of the school system will determine the degree of sophistication required. A subject index can go either on separate pages bound with the minutes or in a card file. In either case, the subjects listed should be in alphabetical order. The card index system has an advantage over the bound pages because a card for each new item can be inserted in its appropriate place without disturbing the alphabetical arrangement of the items. If the index is kept on pages of the minutes book, the insertion of new items may require extensive alterations and the re-typing of the page or of the whole index.

A simpler way to trace subjects back to an appropriate meeting is to put the meeting date on all documents approved or adopted by the board. Just type, print, or stamp "Adopted by the Board of Education (date)" on all policies, resolutions, salary schedules, contracts, and other documents. In other words, the document itself is referenced to the minutes, making a separate index unnecessary.

Distribution of minutes

Minutes of each meeting should be duplicated and distributed to the members of the board with the agenda for the next meeting. In some districts the minutes are distributed to all board members as soon as possible after the meeting. Either practice provides members an opportunity to study the minutes carefully and to retain a copy for their personal files. It also makes it unnecessary to consume meeting time with an actual reading of the minutes. The minutes may be approved as circulated, or corrected and then approved.

The board's official copy of the minutes should be kept in a fireproof vault adjoining the board room or the superintendent's office. Documents that belong to or with the minutes should be kept in the same vault. This also applies to old minutes for so long as they may be needed for reference. Even after they are not needed for reference, minutes should be preserved as part of the school district's permanent record.

To save space, old records can be converted to micro-film.

The minutes of closed meetings should be kept in a separate confidential file until the board votes to make them part of the public record (see below).

Minutes are public records

The minutes of school board meetings are public records. As such, the board has an obligation to see that its minutes are retained permanently and that the public is given access to the minutes under reasonable controls.

Board minutes, like other open records, should be made available for inspection at the school board's official place of business during normal office hours. It is essential that inspection be under the supervision of a responsible employee and that none of the official record be removed from the premises.

State law may permit the school board to require advance notice (24 hours) from persons wishing to inspect board minutes or other available school records or to charge an amount sufficient to cover costs where copies are requested.

6. MAKING AND MONITORING SCHOOL BOARD DECISIONS

Much of what goes on in a school district is governed by state law, federal law, court decisions, and state regulations—not to mention financial constraints and local tradition.

The fact remains, however, that the school board is a decision-making body. Some boards make big decisions governing the overall mission of the district. Some make small decisions governing administrative trivia. Some make both kinds.

Two types of decisions

Although the typical school board appears to make many different kinds of decisions, all of those decisions can be put into two general categories:

- Policy decisions
- Problem-solving decisions

Policy decisions—Policy decisions express the school board's intentions. They provide continuing guidance in making future decisions.

In making discretionary decisions in the day-to-day management of the district, the superintendent is guided by policies of the school board. The discretionary power delegated by the school board to the superintendent does not amount to a license. He is typically required to report periodically on what he has done and to assess the effectiveness of his actions. The basic principles embodied in the school board's policies chart a course of action for the superintendent. These policies reflect the values and wishes of the community as well as state law.

Without board policies, the superintendent and other staff can only guess at the wishes of the board. Therefore, the development and adoption by the board of an official board policy manual is essential. This document must state clearly and positively what the board wants accomplished in such areas as:

- Curriculum and instruction
- Budget, finance, and business management
- Staff development
- Personnel/labor relations
- School board procedures
- Community relations
- Support services

It's important that policies be in writing and easily accessible for the day-to-day guidance of the superintendent and staff, students, parents, and the board itself.

School board policies and administrative rules must be available for public inspection.

Problem solving decisions—Problem-solving decisions come in response to a crisis or opportunity that cannot be properly resolved by the superintendent. For example, in the face of declining enrollment, the typical school board would not expect its superintendent to make a final decision on which building to close. Although the superintendent would be expected to provide information and to make recommendations, the school board should make the final decision and would probably deliberate the alternatives at length.

The problem-solving decision usually has an isolated, one-time impact. But not always. Such decisions can establish precedents that have the force of policy. For example, a school board's decision to grant a benefit to one employee may obligate it to grant it to another in a similar situation.

The decision-making process

Majority rule—School boards reach decisions in several ways. "Majority rule," of course, is the bedrock of representative government and parliamentary procedure. Moreover, it is easy. Following a motion, a second, and discussion, the board president calls for a vote. Then it's just a matter of simple arithmetic.

Majority rule, however, can create problems. For one thing, simple arithmetic can be mislead-

ing. A unanimous vote, for example, makes it appear that the school board is 100 percent in favor of the motion. Yet, each of the voting members may have had substantial misgivings. Each board member goes through a mental process of weighing the pro's and con's. The typical member may have decided to support the motion because the pro's outweighed the con's by a slim margin.

The final tally—whether it's 7-0 or 4-3—looks easy to the casual observer. This easy appearance can be a disservice to the board when the issue is controversial. A "yea" or "nay" vote by itself can give the impression that board members didn't consider all sides of the issue. The result: charges from disgruntled citizens that the board is unresponsive—especially when the vote is reported like the score of a ballgame (7-0, 6-1, 4-3).

One way around this difficult situation is for each member to explain the reasons for his vote on sensitive issues. Another is for the president to summarize the pro's and con's brought out in the discussion in an effort to describe the collective feelings of the board.

Majority rule has another disadvantage. It produces losers as well as winners. That is democracy in action, of course, and should not be harmful. The problem is that the position of the winners may not really be much better than the position of the losers—and the best position of all may be somewhere between the two extremes.

Several heads are almost always better than one. That is why "consensus decision making" is gaining favor among many small groups.

We've gone all-out on Life Safety.

Reaching consensus—Making a decision by reaching a common ground among people usually takes longer than counting a show of hands. However, it may be faster than the debate that divides a board into bitter factions. Consensus decision making builds group cohesion and minimizes the risk of one or two members sabotaging the decision, because all members help shape the decision.

A consensus is reached when every member can agree to support the decision—even though the decision may not have been anyone's first choice. Members with differing views discuss the issue until they reach a common ground.

In making decisions by consensus, it is essential that all members of the board:

- Have ample information and time to study it.
- Candidly share their views and listen to the views of others.
- Attempt to find a decision that all members can support—not just a simple majority.
- Agree to support the final decision.

The role of administration

Planning, implementing, and evaluating decisions made at board meetings typically involves the superintendent and his administrative team at each step.

Administrative recommendations—When the agenda is planned, the superintendent should make a recommendation or take a position on most action items. During the board meeting, members of the board discuss and vote on these recommendations. In general, boards tend to approve the recommendations made by their superintendent—assuming that the superintendent has adequately researched the issue and weighed the alternatives against the goals and standards of the board.

On the other hand, if the board modifies or rejects the superintendent's recommendation, the superintendent remains obligated to support and implement the board's decision.

Following the meeting, the superintendent is held responsible for seeing that board decisions are carried out and is delegated the authority necessary for doing so. Some decisions will require immediate implementation, others can be delayed. Typically there is a time lag between legislative action and implementation. Variables to be considered by the superintendent include: the size of the administrative staff, the board's priorities, the need for a timetable, and the scope of the assignment. If the superintendent has an adequate administrative staff, much of the work can be delegated. In a small school district, the super-

intendent probably will do most of the work and will need to establish priorities. A timetable that lists tasks, dates started, and dates to be completed is useful. Deadlines must be realistic. Tasks which require several months to complete need to be carefully scheduled and monitored. In future meetings, the superintendent can make progress reports to the board on how its decisions are being implemented.

Monitoring administrative performance—The school board relies heavily upon the superintendent for leadership and action. The board is the "governing" body and the superintendent is the "manager" of the enterprise. This means the board must place a good deal of faith in the superintendent—but it need not be blind faith. A school board must be satisfied that the superintendent is managing the district within board policies.

Here are some questions that each board must resolve for itself. For example:

1) Is our board making the decisions that it ought to be making, or is it bogged down with administrative decisions? Is the superintendent making policy decisions?

2) Does the board receive effective leadership from the superintendent in the form of information, advice, and recommendations on board actions?

3) Do the board and superintendent understand and support one another. Is there mutual trust and respect?

4) What kinds of problems are coming to the board? Would they be more readily solved by adequate policies and planning?

5) Is the board adequately informed about the district's problems, progress, accomplishments, and needs? Do board members and the superintendent agree on what the schools are supposed to accomplish?

6) Do board members feel comfortable with the programs and operations of the school district? Are they comfortable with the work of the superintendent? Is the feeling based on fact, informed opinion, or blind faith?

A board that does not have satisfactory answers to the above six questions, probably should consider installing a planned appraisal system. An effective appraisal system benefits the board and the superintendent because it forces them to sit down together and spell out their respective responsibilities and to agree on how the performance of those responsiblities will be evaluated.

7. DEALING WITH THE PUBLIC

Although every citizen is entitled by law to attend school board meetings, only members of the board are entitled by law to take part in deliberations. The meeting is the only means by which a school board carries out its duties and conducts official business. The public attends to listen and observe.

Wise school boards recognize, however, that their meetings provide ideal opportunities for communicating with parents, community leaders, organizations, and other citizens. (See "Planning interesting meetings" on page 18. Also see **Appendix C.**) While no person or group need be allowed to interrupt board deliberations, it is important to give everyone an opportunity to be heard in an orderly fashion.

The public at board meetings

Procedures for hearing citizens—Every school board should adopt policies and procedures for hearing citizens in a manner that does not obstruct the conduct of business. The board policy manual should include a section on citizen involvement at board meetings. Depending upon the number of people who typically attend meetings and ask to address the board, citizen involvement may be loose and informal or strictly regulated. See **Sample Policy Five.**

The extent of restrictions on citizen participation may vary from meeting to meeting. Some boards schedule an extra meeting each month just to discuss critical issues and to get public comments. Procedures for citizen participation at such a meeting can be less restrictive than those necessary for a regular business meeting. The aim, of course, is always to get work accomplished—and to keep democracy from becoming anarchy. As a practical matter, the degree of regulation called for is a function of numbers and emotion—how many people wish to address the board and how controversial is the topic.

Regardless of what the policy says, effective public participation frequently depends upon the ability of the presiding officer. The president must have the authority to (a) require speakers to identify themselves, (b) enforce time limits, and (c) rule inappropriate comments out of order (such as personal attacks on individual students, employees, or other citizens).

Citizens who attend a meeting in order to address the board should not be forced to sit through the entire meeting. (What started out as a mild inquiry can become wild hostility after a couple of hours on a hard chair.) Public participation should be early on the agenda.

All members of the board should be fully attentive when a citizen is addressing the board and should feel free to ask questions for clarification. Moreover, if a citizen's question or concern can be resolved by the president or superintendent immediately, then it should be.

More often than not, however, issues raised by citizens at board meetings call for subsequent follow-up and response at a later time. The board member who responds prematurely, before the

Sample Policy Five—
Public Participation

The Board of Education welcomes attendance by members of the public at its meetings.

The Board shall conduct the business of the District in an orderly and efficient manner, and will, therefore, require reasonable controls to regulate public presentations to the Board. At an appropriate time, the President may invite comments by visitors.

The President is responsible for the orderly conduct of the meeting and shall rule on such matters as the time to be allowed for public discussion and the appropriateness of the remarks to the subject under consideration.

board or staff has an opportunity to study and discuss the matter, usually regrets it. Rather than make a promise that might have to be broken, the president should simply assure the speaker that the matter will be fully examined and an appropriate response made as promptly as possible.

Welcoming visitors—A cordial atmosphere is in the best interests of everyone. Business goes most smoothly when board members and visitors feel comfortable with one another.

Citizens who attend board meetings—unless they do so regularly—are likely to feel some uneasiness. The board and administration can intensify that uneasiness by ignoring the visitor. They can convert the uneasiness to hostility by seeming to question the visitor's right to be there. Or they can dissolve the tension with a cordial welcome.

Wise boards and administrators treat all visitors with courtesy and respect, welcoming them to board meetings as thoughtfully as they would to their own homes. A large turnout can make it impossible for someone to welcome each citizen individually, but the effort should be made with early arrivers at least, and the board president can open the meeting with a brief statement welcoming the audience.

It is also a common courtesy to provide each member of the audience with a copy of the printed agenda, as well as any background materials that will help the visitor understand what the board is doing.

A number of school boards prepare a printed pamphlet for visitors at board meetings. While the pamphlet does not prevent controversial issues from arising at board meetings, it can help keep board meeting procedures themselves from becoming the center of controversy. An effective pamphlet makes it clear that the board acts, not arbitrarily or capriciously, but in accord with fair and sensible rules. Such pamphlets typically explain the rights and responsibilities of citizens, including the board's rules for citizen participation in meetings; how the board handles "new business," and steps the board follows in developinr or revising its policies.

Contents also can include the address and telephone number of the board office, general information about board meetings, and an explanation of the board's powers and duties. The pamphlet also should encourage citizen interest in the schools.

It is part of the board's responsiblity to help educate people about how it conducts business for the citizens and children of the district. In addition to giving first-time guests an understanding of board operations, a school board pamphlet can encourage confidence in the board as an elected body and help people understand how and when their concerns may receive attention.

Plenty of extra copies of the pamphlet should be made available to visitors at each meeting. Additional copies can be distributed throughout the community.

Petitions and delegations—Citizens who feel strongly on specific issues may choose to present the school board with their views buttressed with the supporting signatures of other citizens. In general, a school board should accommodate group petitions in the same fashion as it hears individual citizens. A summary of points to keep in mind:

1) Delegations grow up around sensitive issues and sometime express themselves in harsh words. Special tact is essential.

2) Rather than let itself be stampeded into a quick action it may later regret, the board should stick to its established procedure for putting the matter on the agenda for study and future deliberation and action.

3) A group petition does not necessarily represent the community's prevailing view. (If necessary, this can be determined through community surveys or public hearings.) However, a petition may represent a minority view that is legitimate and fully deserving of school board accommodation. Moreover, a minority view can soon become a popular cause if it is treated callously.

4) Whatever action the board ultimately decides to take, the petitioners are entitled to a full explanation of the reasons.

Closed meetings and the public

Closed meetings create public relations problems for governing bodies of all kinds, even where the meeting is in full conformity with the law. Most common problems occur when:

- The board goes into closed session during a public meeting and leaves people waiting interminably for the public meeting to reconvene.
- The board goes into closed session by asking the audience to leave the room, even if it means standing in the hall or outside in the rain.
- The board goes into closed session at the end of a long public meeting, then reconvenes to take formal action after everyone else has gone home.
- The board makes excessive use of closed meetings, creating the impression that it's hiding from the public.

Avoiding these obvious affronts to the news media and public is not always easy, but here are some suggestions:

- Hold a closed meeting at the end of a regular public meeting when the board expects to take no

formal action as a result. This permits the public meeting to proceed without interruption.

- When a closed meeting must be held during—or at the beginning of—a public meeting, move the board to another room and let the audience remain in the regular meeting room. (This won't apply, of course, when no one attends board meetings.)
- Where a closed meeting will lead to an immediate vote on a sensitive issue, consider holding the session before the scheduled time of the public meeting. Note, however, that this procedure may require special notice both to board members and the public to announce the earlier time.

To keep closed meetings in conformity with the law while avoiding serious public relations problems, the president should explain both the legal basis and practical necessity for closing the meeting.

Handling complaints and criticisms

The typical school board member wants to do what is right and live in harmony with the rest of the community. However, many citizens hold the board of education responsible not only for its own acts, but for the acts of all the employees and students who represent the district.

How school officials respond to complaints and criticisms has a profound impact on the conduct of school board meetings—not to mention the peace of mind of individual board members. In some districts, school board members rarely hear complaints, and even more rarely are they asked to intervene. Board meetings are notable in such districts for the absence of controversy.

In other districts, a meeting of the school board represents a regular forum for airing gripes of all sorts against the schools. Board members are constantly beleaguered with calls from unhappy constituents.

Some of the difference, of course, can be explained by differences among communities. For example, urban and suburban communities tend to generate more dissent and more political activism than small, rural communities. But not always. Levels of criticism vary with the issues facing any given school board. Closing a school can become an explosive issue in even the most passive of rural communities.

Fortunately, there are some things that boards can do to reduce the severity of criticism and, in many cases, reverse its effects.

Research shows that the most supportive constituent is not one who has never complained, but one who has had a complaint handled in a fair, constructive manner. By the same token, complaints that have been ignored and allowed to fester have been known to grow and drive school board members from office. It behooves every board, therefore, to establish official procedures for handling complaints and criticisms. Such procedures serve the best interests of both the school district and the citizen who needs to deal with the district.

There are variations in the ways that different school boards and school administrations deal with complaints and criticisms. Based on local custom, such variations are probably all effective in meeting local needs. However, effective procedures for dealing with complaints and criticisms all have certain principles in common.

The attitudes of school officials—Experienced board members and administrators know there are some people who just like to complain and others who have their own personal or political reasons for attacking the school system. They also know, however, that complaints also frequently arise out of (a) genuine differences of opinion or (b) a failure of the school system to communicate accurate information.

An effective attitude or posture for school officials is one that treats all complaints as legitimate, provides an open mind, and makes no promises that can't be kept. Where a complaint stems from a misunderstanding, the solution is usually to provide accurate information. Where the complaint stems from different values or beliefs, the solution involves negotiation and mutual understanding—recognizing that people don't readily change their values or beliefs and the best one can hope for is that the parties will agree to disagree.

Hello, operator, can you give me a number for the Good Fairy?

Avoiding complaints—Although the schools touch many people in sensitive ares of their lives, some complaints are produced needlessly by the school establishment itslef. Most notable failures occur when:

1) The school board, by its policies and its actions, does not emphasize to all employees the vital importance of human relationships, especially relationships with parents;

2) People who are directly affected by a decision to change bus routes, close a school, or drop a program are not given an opportunity to speak up before the board takes final action. Many boards find they do not hear from affected citizens until it is too late—usually because they rely on passive communications devices, such as public hearings. Boards that truly want to avoid serious controversy take active measures to inform and involve the people who will be affected. Active measures include personal contact by telephone, in person, or personal letter; ad hoc advisory committees; public opinion research, and intensive information campaigns. Different communities respond to different approaches.

3) Staff members who must implement a board decision have failed to determine who needs to know what. For example, people who are affected by a change in bus routes should find out about it long before the morning when the bus comes 15 minutes earlier. Orderly *internal* communication—from board to superintendent to staff—leads to effective *external* communication and avoids many of the causes of complaints and criticisms.

4) A member of the school board wants to be known as "the people's representative" and seeks out complaints and criticisms from citizens, students, and staff. Such activities disrupt the orderly internal communications mentioned above and undermines the ability of school employees to solve problems.

School boards that disply any of the four weaknesses described here probably find their meetings crowded with people's problems and exceedingly long. No board, of course, avoids all types of complaints and criticisms indefinitely.

Different procedures for different problems—Criticisms come in different shapes and sizes. It's not unusual for policy decisions to attract the concerns of groups—residents of a neighborhood, members of an organization, or an employee union. Such groups will typically ask to appear on the board meeting agenda and procedures for responding were discussed earlier in this chapter.

School boards also must have procedures for handling the concerns of individuals. These usually are more personal in nature (a student's grades, for instance). Individual problems can come from employees as well as parents, students, and other citizens. Boards find it most effective when they establish somewhat different procedures for accommodating the concerns of groups, individual citizens, and employees. All such procedures should require efforts to resolve complaints at the lowest organizational level possible and not allow citizens, students, or employees to make "end runs" around supervisory personnel to the school board.

School boards—or even individual members—that do not require complaints to be resolved at the lowest possible level play havoc with their schools. Meetings become crowded with matters that could easily be resolved by a teacher or principal. Administrators and supervisors find they have no real power to make and enforce decisions, so the schools drift into a kind of non-managed status. Chaos displaces orderly internal communi-

Sample Policy Six—
Public Complaints

The Board recognizes that situations may arise in the operation of the system which are of concern to parents or the public. Such concerns are best dealt with through communication with appropriate staff members and officers of the system, such as the faculty, the principals, the central office, and the Board.

The following guidelines are suggested as the proper procedure to be followed by persons with questions or complaints:

1. Matters concerning individual students should first be addressed to the teacher.
2. Unsettled matters from (1) above or problems and questions concerning individual schools should be directed to the principal of the school.
3. Unsettled matters from (2) above or problems and questions concerning the District should be directed to the superintendent.
4. If the matter cannot be settled satisfactorily by the superintendent, it should be brought to the Board of Education. Questions and comments submitted to the chairman of the Board in letter form will be brought to the attention of the entire Board.

The Board considers it the obligation of employees of the system to entertain the questions of parents or the public.

Sample Policy Seven—
Public Complaints about Curriculum or Instructional Materials

If individuals or groups take exception to the materials being used by children in the public schools, they may request a review and reconsideration of particular items.

The following steps will be taken:

1. The complainant will fill out an instructional material reconsideration request. This form can be obtained from the librarian or from the administrative office of the school.
2. Upon completion of the form, the complainant and the teacher/librarian will try to settle the matter between them.
3. If no agreement can be reached, the teacher/librarian will report the matter to the school administrator who, if the matter remains unresolved, will in turn refer it through the superintendent to the Board.
4. The Board may request a full review and reevaluation of the material, or upon receiving the complainant's report and staff recommendations, may make a determination in the matter.
5. The Board's decision will be final.

The Board has endorsed the Students Right to Read, The Library Bill of Rights, The School Library Bill of Rights, and the American Library Association statement on labeling as a part of its stand on student reading materials.

cations. Thus begins a vicious cycle as the board undercuts its staff and breaks down communications, begetting still more complaints.

Policies for handling complaints

Policies for public complaints—Sample Policy Six presents an example of a school board policy on the handling of citizen complaints. To make such a policy work, board members must cooperate by referring citizens to it and by insisting that school employees do everything they can within reason to make it work.

A typical procedure for handling complaints about curriculum or instructional materials, including textbooks and library books, is presented in **Sample Policy Seven.**

Policies for student complaints—Sample Policy Eight presents an example of a board policy on student complaints. A student complaint, of course, often becomes a parent complaint, especially if it cannot be resolved at the building level. The parent can then be referred to the policy on public complaints.

A matter of separate consideration is the appeal of student disciplinary actions, where the law may prescribe action by the school board. That topic is beyond the scope of this book.

Policies for employee complaints—A school board's posture with respect to employee complaints or grievances depends upon a number of factors. Local custom and the board's relationship with its superintendent are two factors. Collective bargaining is another.

A grievance procedure in a bargained contract ensures the union and the employee that the employer will live up to the terms of the contract. A board policy on handling employee complaints, on the other hand, provides a common understand-

Sample Policy Eight—
Student Complaints and Grievances

Decisions made by school personnel—such as aides, teachers, or assistant principals—which students believe are unfair or in violation of pertinent policies of the Board or individual school rules, may be appealed to the school principal or a designated representative. To appeal, students will contact the principal's office in their school and provide their name, the issue, and the reason for their appeal on a printed form available at the office within two school days. The appeal will usually be decided confidentially and promptly, preferably within two school days.

The Board believes that it is especially important for any appeal involving limitation on freedom of speech—such as restricting the contents of school-sponsored publications or prohibiting distribution or posting of non-school-sponsored publications—to be decided as quickly as possible.

However, if the principal does not make a decision within two school days following the date of complaint, students or parents may appeal at that time by contacting the Superintendent or his designee. The information provided should include the student's name, the school, and a description of the problem.

An investigation and decision will be made within two school days and communicated to the school principal and student by telephone. A written copy of the decision will also be sent to the student and principal.

ing among board members, administrators, and employees as to:

- the kinds of issues and complaints that are subject to appeal;
- the precise steps to be followed in making such appeals, as well as actions to be avoided.

Superintendents frequently bring other members of the staff—administrators and teachers—to make reports at board meetings on various projects. Moreover, members of the board and members of the faculty and staff frequently know one another socially. In such relationships, the discussion of general educational or school district concerns can be entirely ethical and even desirable. However, an employee who uses such a relationship to lobby for the board member's support or to plant seeds of doubt about other employees or administrators is not being ethical—and neither is the board member who listens for very long.

It should be noted that a school employee is a citizen as well as an employee and may well have the same concerns as any other parent or taxpayer. Every employee, therefore, would have the same right to enter complaints and appeals as any other parent or taxpayer—so long as the issues raised are related to those roles and not to the role of employee.

Complaints about employees—Most boards listen freely to the complaints of individual citizens and groups who follow proper procedure—with one important exception. A board need not and should not entertain personal attacks on employees, board members, or other individuals at public meetings. If the board abides by civil rules of conduct it should expect others to do the same. (It's up to the president to halt efforts at sarcasm or other unprofessional conduct by members of the board, thereby retaining the moral right to impose the same standards on visitors.) The board is obligated to protect its employees against unjustified criticism or unproven charges.

Complaints against individual teachers and administrators should be brought up through the chain of command. From that point on, any action the superintendent might recommend to the board must be based on sound legal advice, and the board may be asked to take official action to approve a reprimand, suspension or dismissal. The major point is that school employees have legal rights that should not be jeopardized by entertaining complaints in public that may or may not be accurate.

8. DEALING WITH THE NEWS MEDIA

Surveys show that most people know very little about school boards in general or their own school board in particular. A sizable majority in one nationwide study couldn't think of a single thing the local school board had done in the past year or even name one member of the board! One explanation for this situation is that school boards often make little effort to communicate beyond the official school family or beyond what's legally required.

School board news

Most board members make little news by themselves. That is, individual members recognize that they have no authority to act on behalf of the district and no official role outside of a legal school board meeting. They defer to an officially designated spokesman, usually the superintendent or board president. However, a board member is a board member 24 hours a day, seven days a week in the eyes of fellow citizens and news reporters. Some board members have learned (the hard way) that what they say away from board meetings may represent news—especially if it's in the form of criticism or controversy.

Experience shows that a school board's greatest opportunities to make news *as a board* revolve around meetings. And where meetings are dull, news coverage will be dull and the community won't learn much that's constructive about its school board. An exception to the dull meeting syndrome is the sudden explosion of excitement when someone stands up to berate a board member or school employee. When everything else seems dull or remote or overly technical by comparison, a brief emotional outburst by a board member, employee, or district patron can become the primary focus for news coverage.

Obtaining news coverage that provides the community with accurate insights into the work being done by the school board is a challenge in most communities. News media often assign their least experienced reporters to cover school boards. Only a relative handful of reporters specialize in school governance and the legal and practical dimensions of the problems facing school boards.

The challenge facing many school boards and superintendents in small towns is compounded by the fact that small newspapers and radio stations often can provide no staff at all to cover school boards. They are able to report only what is provided by school officials, and don't report what is not provided. School board news, in other words, goes unanalyzed and uninterpreted unless the school district itself has a staff member trained to write news.

Working with reporters

The amount of effort school officials devote to working with the news media probably depends upon the relative importance of news coverage in the district's total communications program. Some school districts supplement news coverage with newsletters, annual reports, advisory committees, public speaking, key communicator networks, and other activities designed to keep all employees and citizens informed.

The amount of effort called for in dealing with the news media also varies with the individual reporter. Experienced, capable reporters become as knowledgeable about school board issues as board members and administrators themselves. They need cooperation, but little guidance in understanding the issues. Reporters new to covering school boards usually need help in much the same way that newly-elected board members need help. Most will welcome assistance; some won't. In either case, school officials are well advised to offer any or all of the following to the new or inexperienced reporter:

- Provide the reporter with a packet of detailed information about the district, its schools and current issues.
- Offer the reporter materials to read on school law and finance in general and on local budget and finance in particular.

• The superintendent and staff specialists should be available to meet with the reporter to provide information on laws, board policies, administrative procedures, and other topics relevant to school board meetings.

• As new issues come before the district, spend extra effort helping the reporter acquire an understanding of the basic facts, alternative courses of action, and any relevant laws or other constraints.

In many cases, school officials have themselves to blame when an ill-informed reporter produces an inadequate news story. The aim of effective news media relations should be to encourage accurate reporting of the major issues confronting the school board. A school board's work is enhanced when interested citizens understand the dimensions of a problem or the pro's and con's of the board's proposed action. Effective news reporting is a big help, even when it is absorbed by only a handful of key people.

Unfortunately, a few school boards get news coverage that is unduly negative. There appear to be a number of reasons:

• They invite suspicion by closing meetings too often and for reasons that are not clear. (The aim should be to build mutual respect and trust.)

• They make it difficult for reporters to obtain information. (The aim should be to help reporters get the information they need. Don't make reporters dig for bad news.)

• No one in particular is assigned responsibility for helping reporters. (The aim should be to keep this important responsiblity from falling between the chairs.)

Ever since I beat him in the school board election he just sits there and mumbles about "twelve years of dedicated public service."

In some districts, the responsibility for working with the news media may be assigned to the school board president, secretary, or other member. More often, however, the task is assigned to the superintendent, who may in turn delegate it to a community relations officer or other administrator. One advantage of placing this responsibility in the hands of a staff member rather than a board member is that good media relations calls for daily effort. In other words, it is best considered an administrative task, although the board president may be called upon from time to time to address the media on behalf of the total board.

The steps that school officials can take to encourage effective news coverage of board meetings fall into four categories: preparation in advance of board meetings; providing for reporters at meetings; handling interviews properly, and follow-up. Here is a checklist of some considerations in each category:

Preparing for news coverage

1) Don't surprise the news media. Be sure reporters know about the meeting, including the agenda and any closed session that may be called for.

2) Assign someone to meet with the reporters prior to the meeting to review the agenda. Be sure reporters understand the issues facing the board to help them follow board discussion. But don't predict what action the board will take. If this meeting can be held several days before the meeting, news reports in advance of the meeting will help the public understand the issues coming before the board. But don't provide materials to the media before it is provided to all members of the board.

3) Don't play favorites among news media; get to know all the reporters and be sure reporters know whem they can call for more information.

4) Determine whether any of the news media have special needs in covering the meeting. Some may need access to telephones, typewriters, or other equipment. An early evening deadline for a morning newspaper or the 10:00 p.m. television news may make it advisable to put newsworthy issues early on the agenda. Needs of this sort are determined by talking with reporters, not by guesswork.

5) Hold periodic seminars or news briefings on the district budget, student testing, staff evaluation procedures, and other complex topics.

6) Don't be afraid to point out items on the agenda that are of special significance and why. But don't be surprised if reporters find other things more important.

During the meeting

1) Be sure reporters are supplied with all the same materials that are provided board members, with the exception of confidential items.

2) Seat reporters at a table located where they can see and hear without straining.

3) Make a knowledgeable administrator available to answer questions of reporters after the meeting.

4) Encourage the board president to summarize major points of discussion and make sure everyone in the audience—reporters included—understands the action taken by the board on each issue.

Handling interviews

1) The superintendent, community relations officer, and board president might schedule a brief meeting with the media following the meeting if the hour is reasonable. Reporters may have questions that need clarification.

2) Staff members who make presentations to the board can be made available for interviews following the meeting or the next day.

3) Be mentally prepared for interviews, but do not memorize answers. Be conversational and polite, but stay on guard. Think through your answers before speaking. Never become angry at a question.

4) Be honest and direct, even if it hurts. People remember dishonesty long after they've forgotten the facts.

5) Do not speak "off the record."

6) If you honestly don't know the answer to a question, say so. If you promise to find an answer and call the reporter, do it promptly.

7) Don't say "no comment." If confidentiality prevents your answering, explain why.

8) Speak plain but correct English. You want to be understood, but don't want your words to make you sound like a simpleton.

9) Be brief and focus on your major points, especially with radio or television reporters. The broadcast media may give you only 10 seconds of air time—perhaps 30 seconds on a slow news day.

Follow-up

1) If you've promised to call a reporter who had to leave the meeting early, do it promptly. Respect deadlines.

2) Try to see all reporters before they leave the meeting in the event there are any unanswered questions.

3) If possible, see that the recording secretary is available to reporters who need to check the wording of motions and other factual matters.

4) Keep the press informed as decisions of the board are implemented by the administration in the days and weeks following the meeting.

See **Appendix F** for more tips on working with the news media.

9. EVALUATING THE SCHOOL BOARD MEETING

School boards that want to do a good job of governing their districts and seeing that their schools are properly managed cannot escape the importance of their meetings. For all practical purposes, a school boards exists only while it is convened in a legal meeting.

If things are not going right, there is only one place to begin looking for the problem. Look at how meetings are conducted, how decisions are made, and how crises are handled.

A school board can set up a regular procedure for evaluating its meetings. Once a year or once every two years is probably sufficient for a review of how things are going—if things are going reasonably well. If there are trouble signs, an immediate evaluation is in order. See **Exhibit D.**

There are a number of ways to approach the evaluation of school board meetings. A board with members who are generally compatible and comfortable with one another and the superintendent can use a "do it yourself" method. All they need is a checklist of major factors in effective board meetings to serve as a springboard for open discussion. Checklists are available from the NJSBA.

A board that is badly split should hire a process facilitator who can help members deal with conflict constructively. Board meetings will never improve until all members agree to work at it. The object is to draw all members of the board into an agreement on how meetings should run and then see that meetings actually are run that way. Open discussion is essential.

A variation of the "do it yourself" approach is to ask each board member to rate the board's performance on a list of items. Then have one member or the superintendent tally the results. Areas of disagreement will merit particular attention.

A school board will sometimes discover itself with procedural problems it cannot solve alone.

Exhibit D—Some Symptoms of Bigger Problems

Here are just a few of the symptoms of ineffective board meetings. The first step in eliminating the symptoms is to seek out the real cause by scheduling a meeting to evaluate meetings.

- Decisions that should be made by the administration show up on the agenda for board action.
- Major policy decisions that should be made by the board are being made by the staff.
- Items brought up for action by board members catch the superintendent by surprise.
- Items brought up for action by the superintendent catch board members by surprise.
- Some board members seem to receive more information from the superintendent than others.
- The press is regularly critical of closed meetings or other board procedures.
- Board meetings are being used as a platform to reach the public by members of the board or representatives of special interest groups.
- Meetings run too long.
- Meetings don't run long enough.
- In spite of lengthy discussions, decisions don't get made.
- There is disagreement as to what the board actually decided.
- Meetings produce ill will among board members or between board members and superintendent.
- Board decisions frequently produce unanticipated criticism.
- Citizens and employees persist in contacting board members to get their school problems resolved.

If your school board regularly experiences any of these problems, an evaluation of how the board operates will be beneficial.

Exhibit E—Meeting Evaluation Checklist

___ 1. **Planning.** Has the board developed adequate planning procedures for determining agendas and preparing back-up reports and briefings?

___ 2. **Pre-meeting dissemination.** Has the board developed adequate procedures for getting meeting materials and notices in the hands of board members, the press, and public leaders two or three days in advance of meeting dates?

___ 3. **Pre-meeting conference.** Do the board president and superintendent confer before each meeting to review upcoming business, to clarify agenda items, and to anticipate possible problem areas?

___ 4. **The setting.** Has the board found and furnished the best possible setting for its meetings?

___ 5. **Homework.** Do all board members study the agenda, read the reports, and come to meetings prepared to contribute to substantive discussions and not waste meeting time by going over matters that were already included in the pre-meeting folder?

___ 6. **Public involvement.** Has the board established an orderly method whereby the public, including students, may get a hearing at board meetings? Does the board president make public visitors feel welcome in the board room?

___ 7. **Proper role.** Has the board developed a clear policy as to the kinds of matters which need *not* be brought to the board's attention and which may be handled by administrative action?

___ 8. **Recommendations.** Does the superintendent expedite business by specifying his "Recommended Action" on each major agenda item?

___ 9. **Advice.** Does the board encourage the superintendent to invite staff specialists to board meetings to supply back-up advice and knowledge on recommended proposals?

___ 10. **Pace.** Do meetings begin on time? During meetings, does the board president keep an eye on the clock so that adequate time can be provided for important matters?

___ 11. **Clarification.** Does the board president clarify each agenda item? Does he clarify—for the benefit of board, press, and public—specific goals to be achieved? Is he adept at summarizing arguments before bringing matters to a vote?

___ 12. **Control.** Does the board president keep discussions to the subject at hand? Does he bring members to order when they interrupt the speaker who has the floor—or talk while the speaker is talking? Is he firm when firmness is required?

___ 13. **Post-meeting dissemination.** Does the administration see to it that staff, students, and the public are immediately informed as to the results of "last night's meeting?"

___ 14. **Policies.** Has the board developed an adequate set of written policies or by-laws on Board Meeting Procedures?

—Developed by the National School Boards Association

Consultants are available from the school board association, and other sources to help in such situations.

A board also may feel the need for objective analysis. One approach to obtaining third-party opinions is to involve employees and citizens in rating the board's performance on a list of items. Such opinions can bring deficiencies to light, but might not produce solutions. Again, outsiders who are experienced at working with boards can bring impartial thinking to the evaluation.

It should be noted, however, that many of the problems that surface in board meetings are not related to meeting procedures. A poor working relationship with the superintendent, for example, can produce various difficulties at meetings. Unless the board and superintendent have agreed on what is delegated to the administration and what is board policy, the superintendent may be bringing numerous administrative decisions to

the board for action.

By the same token, board decisions that backfire may be symptomatic of:

- decisions made under pressure (failure to follow constructive procedures in responding to demands from citizens or employee groups).
- decisions made with inadequate information (failure to request additional information, obtain input from people affected, or examine alternatives).

One thing seems clear: If there is anything wrong with the way a school district is governed, it will show up in the meetings of its school board. An evaluation of school board meetings, therefore, can have ramifications for all school district operations. A breakdown in the relationship between a teacher and a parent . . . the inability of a faculty curriculum committee to agree on a reading text . . . an inefficient bus route . . . these matters are easily attributed to employee performance. But many of them can also be traced back to the fact that the school board was not prepared to make the right policy decision at the right time because its meetings are poorly handled.

Appendix A

Making the Board Meeting Work is Every Member's Job

By CLAYTON F. THOMAS

The effective school board is one that aggressively tackles its work as a unified group.

Each school board, of course, consists of individuals who may or may not care about the success of the total group—or its public image. Some members are proud to be a part of the board and take personal responsibility for making meetings productive. Other members have personal axes to grind or simply prefer to be doing something else.

Look around at the school boards you know. Note that some boards seem able to weather just about any crisis. They display little hesitancy or awkwardness in dealing with the most controversial issue in public meetings. They respond to issues as a team and emerge with solutions that leave individual members still on friendly terms with one another. No matter what the issue, the board survives intact.

Other boards never quite learn to work as a group. They have difficulty resolving the simplest problems. Their hesitancy or internal bickering give their constituents a bad impression. Such boards may spend an inordinate amount of time in executive sessions—perhaps arguing among themselves.

The difference? On the successful board, each member feels responsible for productive meetings. The responsibility is not left entirely to the board president or the superintendent.

It goes almost without saying that the responsible board member comes to meetings prepared, abides by the board's rules of procedure, and respects the total board's goals and policies. Certainly nothing is more disconcerting than a board member who unseals his agenda packet at the start of the meeting. (The sound of a tearing envelope is a warning to all that someone is not prepared.) Even more difficult is the member who pursues a separate agenda.

In addition to these basic considerations, there are many ways in which the individual member influences the behavior of the total board, for better or worse. Here are some suggestions for the board member who wants to exercise a positive influence in making board meetings productive and upgrade the public's perception of the school board:

1) Use appropriate communications skills.
2) Deal constructively with conflict.
3) Deal constructively with uncooperative board members.
4) Help new board members become part of the group.
5) Encourage your board to evaluate its meetings.

1. Using communications skills

If things did not go well at your last board meeting, ask yourself how you could have helped. Did you talk too long? Were you willing to share ideas and feelings? Did you truly listen to others' ideas and feelings? Did you seek the opinions of others who were reluctant to speak? When each member feels a sense of responsibility for a successful meeting and uses reasonably appropriate communication skills, success is easily attained.

Some of the essential communication skills are *paraphrasing* in order to ensure understanding of ideas, *listening for feeling* in order to comprehend how people feel, and *giving feedback* to explain your own thoughts and feelings. Fortunately these skills are not difficult to acquire. They just take practice.

• **Paraphrasing.** The process of restating in your own words what others say and then checking it out with them is called paraphrasing. For example, after listening to a member expound on the school tax rate, you might paraphrase him or her by saying, "Then you are not in favor of a tax rate increase, is that right?" Note that the paraphrase ends in the form of a question in order to check out the accuracy of your paraphrasing. A small amount of practice will improve your skill, but it also will demonstrate that paraphrasing is possible *only if you are actively listening.* Therefore, focusing on paraphrasing eliminates the need to focus on listening as a skill. Listening becomes a by-product of paraphrasing.

• **Listening for feeling.** It is important to recognize that feelings are communicated just as ideas are, although not always with words. Facial expressions, gestures, body positions, and voice tones as well as words are clues to a person's feelings. When impres-

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sions of a person's feelings are received, they can be checked out with such statements as:

"You seem upset by what I said. Are you?"

"Am I correct that you are disappointed in our decision?"

It is important that your perception of someone's feelings be expressed as a question, not as a statement of fact.

Many times feelings are obvious but never acknowledged by either party—even though we know that these feelings are at least as important as thoughts or ideas. The significance of listening for and acknowledging feelings is that it is an excellent way to dissipate or prevent conflict. When negative feelings are identified early, they can be dealt with before a major explosion occurs. Checking out feelings also allows us to correct any misconception we might have about a person's feelings before we act inappropriately.

• **Giving feedback.** The ability to communicate our own ideas and feelings to others, particularly when these feelings are negative, is an important skill for board members. Most often, feedback is intended to change someone else's behavior. Therefore, feedback must be presented in a non-threatening manner. If feedback produces a defensive reaction, little behavior change will occur. On the other hand, the feedback cannot be so subtle that it passes unnoticed. The difference between feedback that generates a defensive reaction and that which creates a more favorable response is not the frankness of the comments. Being "politely frank" with a person can be just as unproductive as being blatantly obnoxious.

Perhaps the most important feedback skill is the ability to use *descriptive* feedback as opposed to that which is judgmental. Almost without exception, a judgmental statement intended to change another person's behavior will create resistance to change. When you say to a person who frequently uses profanity that he "is vulgar," you have made a judgmental statement. That is, you have judged the person and found him vulgar. The recipient of such a statement is likely to respond in kind with, "Your manner of speech isn't so _____ good either."

A more productive approach is to describe the impact that profanity has on you, such as: "I have listened to you for 20 minutes and you have used that word six times and each time I felt like leaving." Such feedback is not presented as a universal truth, but as one person's observation and reaction. As such, it does not put the profanity-user on the defensive. The statement leaves the recipient free to accept or not accept your feedback. It may generate some negative responses, but the seed will have been planted. The recipient will now have information about the impact of his behavior which may help him change.

It should be noted that descriptive feedback may also be of one's feeling as a result of the other's behavior. In the previous example, the statement, "I feel like leaving" is such a statement. Comments such as, "It upsets me," "I became anxious," or "I wanted to cry" fall into the same category. When using feedback statements reflecting your personal feelings, it is still important to be descriptive. To say, "*I feel you are* vulgar" is not different than saying, "*You are* vulgar." In either case it is judgmental. It would be far better to say, "Your use of profanity disturbs me," which describes your feeling as a result of the behavior.

2. Dealing with conflict

Each board member is a product of his or her own unique experiences in life. Consequently, each has different values and goals, making some conflict inevitable. The challenge for the school board is to recognize that conflict has many positive aspects and to learn how to deal with conflict so that negative features are minimized.

One positive feature of conflict is that it results in better decisions because individuals are forced to defend their positions. Open discussion allows many members to influence the decision. (Seven heads are better than one.) Conflict also stimulates people to get involved. This involvement not only improves the decisions, it gives members a chance to drain off any feelings of hostility.

It is important to recognize the positive values of conflict, because a feeling that conflict is undesirable usually results in sweeping disagreements under the rug. The result is a latent form of conflict that smolders for long periods of time, sapping the energies of the board. Eventually it bursts into heated arguments that further deteriorate relationships.

The school board must learn to bring differences out in the open early and to interact in a productive manner. This requires a combination of group processes and individual skills. Bringing conflict to the surface can be done by any member of the board who senses a conflict that needs discussing. In doing so, it is important not to make judgmental statements or assess blame. These opinions can come later.

For example, it is constructive to say, "I'm unhappy with the district's textbook policy."

It is destructive to say, "Last year's board used poor judgment in developing what is obviously a lousy textbook policy."

In the first example (which describes your feelings) the natural response is simply, "Why are you unhappy with the policy?" In the second case (which judges both the policy and the previous board) the natural tendency for veteran board members is to defend the policy, saying, "I suppose you think you can do better." The ensuing conflict will be a win-lose venture in which the losers will be unhappy and seek their revenge at another time. In the long haul, everyone will probably lose.

Once a conflict is brought to the surface, it is best dealt with openly in a problem-solving session where ideas are expressed and feelings shared. The aim should be to reach a consensus on the issue. This does not mean a unanimous vote is essential nor does it mean everyone has to agree. "Consensus" simply means that:

• All board members have expressed their opinions and feelings, and

• Everyone is willing to support the decision or at least willing to go along with the decision without sab-

otaging it.

Of course, some decisions reached by consensus must subsequently be voted on to become a matter of official record.

Most people instinctively try to avoid conflict. During a discussion of conflict issues, it helps to keep in mind some of the ways that we typically avoid dealing effectively with conflict issues. In fact, it would help to permanently display a list of these behaviors in the school board meeting room. We are all guilty of these destructive behaviors when conflict arises and need to be reminded from time to time:

- Making attacking statements (i.e., that's stupid)
- Interrupting
- Talking in the third person (i.e., *they* think, rather than *I* think)
- Muddying the waters
- Changing the topic
- Withdrawing from the discussion

The behaviors that help deal constructively with conflict are:

- Listening and trying to understand
- Stating your own ideas, opinions, and feelings

As strange as it may seem, a common characteristic of most people in conflict situations or when dealing with controversial issues is to avoid admitting their own feelings. Such statements as "The citizens won't accept a district-wide sex education program" represent a common way of copping out. Such a statement does not provide a good point of discussion, because the speaker has not expressed his *own* feelings. For example, does the speaker feel that sex education is valuable and should be implemented? Or does the speaker dislike the program on moral or religious principles? Maybe the speaker likes the program but believes the community's response will be too unfavorable. Each of these interpretations of the statement suggests a different course of action or different topic of discussion for the board. Therefore, the sooner everyone's position is known, the sooner the group can come to grips with the real issue. Again, this involves a sincere effort to state your own ideas and feelings.

3. Working with the uncooperative member

Passing judgment on the behavior of others is always a dangerous practice. Attempts to change that behavior is even more so. Most of us generally behave as we do because (1) we are not aware of how our behavior is being perceived and (2) we are acting out some basic need, such as a need for belonging or status within the group.

In considering ways to deal with the uncooperative board member, one thing is worth remembering: we can only change our own behavior, not the behavior of others. If we expect others to do something different, we must ourselves do something different first. For example, *telling* people that they need to prepare for meetings, consider all the options before deciding, avoid becoming involved in administrative matters, or speak respectfully to others will not have much impact. However, *doing* something—such as holding new board member orientation sessions where a "problem" member plays a leadership role—may have an impact.

Sharing your negative feelings in a positive way rather than giving advice may motivate an individual to reconsider his behavior. Keep in mind that many times behavior can be improved by meeting an individual's basic needs for belonging and for recognition and status within the group. Ask yourself, "what have we done to make the uncooperative board member feel he or she belongs?" "What have we done to meet the ego-status needs of the individual?" Answers to these two questions, accompanied by appropriate behavior changes on your own part, frequently produce surprising results.

4. Helping the new board member

Newly-elected board members come to their first meetings as "outsiders" with ideas to share and a strong desire to belong. To be sure, a few come with their armor polished and their axes sharpened. In either case, the first objective of incumbent board members should be to achieve a level of "belonging" for each new member.

Each new board member, whether he is conscious of it or not, must find an answer to the question, "Who or what am I to be in this group of board members?" Until such feelings and emotions are dealt with, the individual will have difficulty functioning as a part of a team.

As new members struggle to establish an identity within the group, their behavior may take different forms. Some may be aggressive, some may be humorous, and others become listeners.

Eventually, each member finds a comfortable role which seems appropriate for this particular group. Once this role is found, the member will begin to feel a part of the group and begin to seek a share of the power and influence that the board of education controls as a group. The new members' behavior at this stage may consist of fencing, testing each other out, or over-aggressiveness. These behaviors among new board members are normal, but some tension will be evident.

During this period of getting acquainted, all members of the board will be preoccupied with their own feelings and less able to listen to each other. Yet, this process of each board member and each board going through these growing pains is the way a board becomes a real group capable of a team effort.

In reaching a comfortable level of mutual trust, each member's attitudes and skills are important. The goal is to lead the new member to a sense of personal responsibility for the performance of the total board. To achieve this, each incumbent board member must feel partially responsible for helping the new member acquire a feeling of belonging.

Part of the task is accomplished by providing the new member with information and opportunities to acquire knowledge and skills. The rest of it depends on patience, understanding, and involvement.

5. Evaluate your meetings

It is a wise board of education that frequently takes stock of its meetings. A few minutes of discussion be-

fore adjourning can alleviate many potential problems. Talking about how the meeting went (not what was decided) can help all members, particularly new members.

For example, if the meeting took longer than expected, discuss why. If you felt you had insufficient information to make a good decision, share your concern. If you were able to achieve consensus early, consider why the board seemed so productive.

It is far better to discuss these items as a group than it is to talk about them as you leave the meeting or complain to your spouse when you get home. This occasional self-analysis by a board should not take the place of an annual evaluation involving the superintendent. It will, however, make an annual evaluation much less traumatic.

These five steps should help any group of board members work together more effectively. In fact, if only one member puts them into practice with persistence, the beneficial results can be startling.

Appendix B

Plan Ahead with a Twelve-Month Agenda

By GARY ASHLEY

The agenda has become the most important tool the local board uses to conduct its business. It is a diagram whereby the board can proceed with one item of business to another in a methodical manner.

An effective board meeting will proceed smoothly and efficiently if the agenda is prepared with an itemized order of business and each item is supported with adequate information and/or recommendations.

Preparing an agenda for the regular board meeting is normal procedure for most boards, but how often have you or your colleagues said:

1) we should spend more time reviewing and developing policy;

2) too many administrative and trivial items appear too often on the agenda;

3) we are not using our meeting time wisely;

4) too often we are asked to approve something because it's "due now;"

5) we do not allow time to discuss new and/or pending legislation which is before the legislature;

6) we should spend more time in setting goals and priorities;

7) we should spend more time in determining our progress as a board and measuring the system's objectives, and we do not have enough background information to vote on agenda action items;

8) we should spend more time in setting overall budget priorities for two years, three years, maybe five years.

In order to establish a plan for the board to conduct its business on an annual basis, a 12-month agenda is a possibility. The 12-month agenda does not replace the regular agenda, but is a schedule where certain items and programs are reviewed, considered, and approved by the board during the current school year.

Developing a 12-month agenda requires time and planning. The board and superintendent (also, key central staff) can schedule a retreat for this purpose. The retreat should be scheduled during early spring and the only item of business is to develop the 12-month agenda for the following year.

What are some advantages to planning a 12-month agenda? The board can:

1) establish review dates for previously adopted policies;

2) establish dates for recurring administrative items that must be acted upon;

3) establish dates for various community groups to express their concerns;

4) establish dates for the staff to present pertinent information on important topics for consideration;

5) establish dates to review the system's goals and objectives;

6) establish a planned procedure well in advance for approving the budget for the next fiscal year;

7) establish review and approval dates for annual program plans required by state and federal departments;

8) establish dates for the board's self-evaluation, and evaluation of the superintendent and the school system;

9) schedule for attendance at district, state and national school board meetings.

A 12-month agenda can give leadtime for the board to study and consider many important decisions it will make during a year. This procedure can also provide the superintendent and staff adequate time to prepare good information and recommendations for the board.

An organized agenda for regular meetings and planning on a yearly basis, by using a 12-month agenda, should expedite and improve the quality of the conduct of the board's business.

Gary Ashley is executive director of the Georgia School Boards Association. This article is reprinted with permission from the *GSBA Bulletin* where it first appeared in April, 1979.

Appendix C

Using the Board Meeting as a Public Relations Tool

You have to have board meetings anyway—with a little extra effort it's possible to turn the routine meeting into a valuable communications tool. Following are some tips on making them inviting, interesting, and informative.

Before the meeting

- In addition to the unavoidable routine matters, schedule a portion of each meeting for special presentations on exciting programs, reports by special committees of their findings and recommendations, or a discussion of a current problem or issue by a knowledgeable staff member. Keep the presentations brief and lively, and allow time for questions.
- Consider devoting one meeting a month to the 'dull stuff'—routine financial and operational matters—and reserving as much as possible of a second monthly meeting to discuss goals, programs, and so forth. This not only makes for an interesting meeting, but sets aside time for important matters that often become buried in routine business.
- Prepare as much background materials as necessary to clarify major agenda items. Make available copies of reports, budgets, letters, and any other relevant materials to the news media and public. There's nothing more frustrating than trying to follow a discussion of material you haven't seen. "Executive summaries" aid understanding where material is burdensome and complex.
- Adopt and publicize written policies on how the board handles agenda development, public participation, and new business. Well-understood policies avoid misunderstandings when the board encounters complaints, petitions, emergencies, and other unplanned situations and surprises.
- Publicize the meeting well in advance, not just time and place, but important topics that will be discussed. If any special awards and presentations will be made, publicize those, too.
- Mail agendas and backup information to news media and to key citizen groups ahead of time. Make the material available at the door as well.
- Consider whether any presentation or discussion item lends itself to audio-visual illustration. Don't overdo it, but occasional slides, filmstrips or other materials can lend interest.
- Recognize student, staff, and other achievements at meetings, but keep it brief. Long eulogies are boring and inappropriate.
- If the district is large, consider holding occasional meetings in different ares of the district.

Physical setting

- Treat visitors as the taxpaying constituents they are. Make people feel welcome and wanted.
- Be sure the room is large enough and that there are enough chairs. If a controversial topic is scheduled, you may need a larger-than-normal meeting room.
- Have plenty of copies of agendas, background material, ground rules for public input, and other relevant information available at the door.
- Schedule a break or two in the agenda. If feasible, offer coffee or other light refreshment.
- If visual presentations are planned, make sure equipment has been checked carefully and that somebody knows how to use it. If charts or other poster-type materials will be used be sure they are big enough to be seen easily by the audience.

Running the meeting

- Follow clear rules of procedure for an orderly, smooth meeting, but don't allow proceedings to be derailed by trivial points of order.
- The presiding officer should keep firm control of the meeting at all times, never allowing personalities to intervene in the discussion.
- Be receptive to members of the audience. If a question can't be answered at once, promise to get back to the inquirer, and be sure to do so. However, encourage parents and others with problems to follow administrative channels first. The board should be only a "final appeal" for matters involving student-teacher relationships and the like.
- Do everything possible in public. When lawful confidentiality requires a 'closed door' discussion, be sure reporters and audience understand clearly the reasons for the private session.
- Never allow the board to become sidetracked into discussions of matters on which information is not available. Unless a true emergency exists, table the topic until information can be compiled and studied.
- The day after the meeting, circulate a simple bulle-

tin to the staff (and key community leaders) to head off any rumors or misunderstandings about board actions.

Helping the reporters

- Recognize that it is in your interest to help reporters prepare clear, accurate stories. Many more people will read about the meeting in the newspaper than ever will attend one.
- Recognize that the reporters who cover board meetings are often inexperienced and know little about technical school matters. Designate a representative of the board to serve as spokesperson and be sure all reporters have his or her office and home telephone numbers.
- Distribute agendas and plenty of background materials as far in advance of the meeting as possible. Provide telephone numbers of the person(s) who can answer questions on important agenda items. Consider meeting with the press prior to the board meeting to provide background on complex or technical agenda items.
- Set up a press table close to the board and seat a knowledgeable staff member there who can answer questions as the meeting progresses.
- However late the meeting ends, someone should stick around to answer reporters' questions. Reporters for the morning papers must write their stories immediately, and answers that come the next day are too late.

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Appendix D—Quick Reference for Appropriate Motions to Use in Various Situations

If you want to. . .	Motion to use	Needs a second	Can be debated	Can be amended	Vote required
Introduce an item for action	Main motion	Yes	Yes	Yes	Majority
Modify the motion	Amend	Yes	Yes	Once	Majority
	Divide the question	Yes	No	Yes	Majority
	Refer to committee	Yes	Yes	Yes	Majority
Defer action	Postpone	Yes	Yes	Yes	Majority
	Table	Yes	No	No	Majority
	Refer to committee	Yes	Yes	Yes	Majority
Prevent action	Before debate: object to consideration	No	No	No	Two-thirds
	After debate: postpone indefinitely	Yes	Yes	No	Majority
Reject the question	Before debate: object to consideration	No	No	No	Two-thirds
	Move previous question or close debate	Yes	No	No	Two-thirds
	After debate: postpone indefinitely	Yes	Yes	No	Majority
Consider a question a second time	Take from the table	Yes	No	No	Majority
	Reconsider	Yes	Yes	No	Majority
	Rescind previous action: without previous notice	Yes	Yes	No	Two-thirds
	with previous notice	Yes	Yes	No	Majority
Vote on the question	Call for a vote	No	No	No	Majority
	Move previous question or close debate	Yes	No	No	Two-thirds
Re-open the main question to debate	Reconsider	Yes	Yes	No	Majority
Change the form of debate	Limit debate	Yes	No	No	Two-thirds
	Move previous question or close debate	Yes	No	No	Two-thirds
Interrupt to make a personal request	Rise for information	No	No	No	None
	Question of privilege	No	No	No	Decided by chair
	Withdraw a motion	No	No	No	Majority
	Parliamentary procedure inquiry	No	No	No	None
Correct a mistake in the proceedings	Point of order	No	No	No	None
Propose action which violates a rule of the meeting	Suspend the rules	Yes	No	No	Two-thirds
Challenge a decision of the chair	Appeal	Yes	No	No	Majority

Appendix E

Presidential Style— Unique as Fingerprints

By FRED M. HEDDINGER

The way in which an individual school board president defines his role as a leader may be as unique as his fingerprints. As long as he accepts certain important responsibilities, his approach isn't crucial to his success—it's purely a matter of style.

Many school board presidents believe that their role should be to serve as a strong leader for other board members and for the superintendent and his staff. Under such an agreement, the board president may choose to do these things:

1) Serve as chief spokesman for the board.

2) Keep abreast of local, state, and national educational issues through direct involvement in various conferences and programs dealing with such issues.

3) Participate in local, state, and national organizations which have an impact on public education.

4) Impart to other board members and to the superintendent and his staff a perspective and point of view which result from such active personal participation.

5) Help establish for the school district, through discussion with other board members and the superintendent and his staff, goals which are in tune with the needs and resources of the community.

6) Assign committees that will help research and provide information to the board-at-large on special issues.

7) Serve as a personal counselor, or informal sounding board, for the superintendent as he grapples with some of the problems that confront him, recognizing that such a role carries with it the need for confidentiality and utmost discretion.

8) Personally run the school board meetings and personally follow up to see that agreed-upon action is implemented.

School board presidents who use this style of operation are both successful and unsuccessful. When successful, they are sometimes outstanding. When unsuccessful, the results may be disastrous.

Other school board presidents believe that their role should be to function as a catalyst rather than as a strong personal leader. Under such an arrangement, the board president may choose to do these things:

1) Appoint someone to serve as chief spokesman for the board.

2) Involve other board members and the superintendent and his staff in conferences and programs dealing with educational issues.

3) See that the board and the school district participate in local, state, and national organizations that affect education.

4) See that persons who do participate in such activities share their information and points of view with those who have not participated.

5) Look to the superintendent and his staff and to the other board members for recommendations concerning the goals and possible programs of the school system.

6) Periodically provide opportunities for the superintendent and the board to discuss informally some of the concerns of the superintendent, both personal and professional.

7) Deliberately limit the amount of personal involvement and time spent on school board affairs.

School board presidents that use this style of operation are also both successful and unsuccessful. When successful, they have also involved other people to the degree that some of this success is also shared with them. Similarly, when unsuccessful, others who have played a role must share in the lack of success. Even when unsuccessful, this model tends to limit or moderate the degree of failure so that disastrous results are less likely to occur.

These two models, or styles, are obviously not the only styles by which a school board president can function, nor are these characteristics necessarily the most important to be considered. Rather, they are used to illustrate that there is no single model for success or failure in your role as a school board president. Whether you choose to use one of these models, or a mixture of both of them, or some other model of your own design, there are certain things for which a school board president should accept responsibility beyond those things that are mandated by school law.

A board president should make sure that his board has a clear understanding of policy regarding:

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1) Who will be spokesman for the board.

2) Who will have responsibility for development of agenda items for board meetings and for preparation and distribution of an agenda.

3) The way in which the board will communicate and give direction to the superintendent and his staff.

4) The way in which board members and the superintendent and his staff will participate in local, state, and national programs and organizations so that all parties know how the school district will be involved in, and kept abreast of, educational issues and concerns.

5) The way in which information will come before the board for consideration and action.

6) The working relationship with the superintendent and his staff.

7) The orderly and thorough development of information related to issues on which the board must act.

8) A proper method to inform all persons affected by a board action, or proposed action.

While it is true that the personal style of school board presidents will vary greatly, these eight "make sures" will greatly help to ensure the success of your role as a school board president, no matter what your style may be.

Some school board presidents serve for one year, some serve for many years. Some are catalysts; some are strong, dynamic leaders; and some are binders who tend to bring other people together on a common issue or objective. No matter which, we hope that these suggestions will be helpful to you as a leader of educators.

Appendix F

Working with the News Media

"Absolute freedom of the press to discuss public questions is a foundation stone of American liberty." Herbert Hoover

"An editor is someone who separates the wheat from the chaff—and then prints the chaff." Adlai Stevenson II

The local news media can be among your most effective, helpful channels of communication—or they can make your life a misery either through lack of understanding or outright hostility.

Either way, you have to deal with the news media, and it's worth the additional effort to enlist them in your cause. Following are some general tips on dealing with the media and suggestions for solving specific media relations problems.

Some principles

Principle #1: **Reporters are people—with jobs different from yours.**

- Get to know local news executives, but keep in mind most of your contacts will be with reporters. Never go over a reporter's head unless the situation is critical.
- Get to know the reporters who cover your schools. Remember their names and chat informally from time to time. This is a continuing process, as turnover is rapid, but worth the time. A common interest in Chinese cooking or scuba diving can help smooth over minor problems.
- When a new reporter comes on the scene, set up an informal meeting to discuss the problems and issues facing the system. Introduce him or her to board members and key administrators. Provide telephone numbers—office and home—for those who can answer questions. Let the reporter know you will be in touch when something is happening (or about to happen)—then keep your word.
- Never play favorites. Be equally friendly with all reporters and call all media when something happens.
- If a problem arises—a hostile story, the overlooking of 'good news' or just plain mistakes—don't let it fester. Get in touch right away and discuss what can be done to straighten things out.
- Never be hostile to a reporter. You may feel justified, but the reporter nearly always holds all the cards.
- Authorize several administrators and one or two board members to serve as spokespersons so the reporter stands a good chance of being able to reach someone on short notice. "Unavailable for comment" never makes you look good. (In highly sensitive situations, it may be necessary to have only one spokesperson. Explain why to reporters.)
- Be aware of reporters' deadlines. Often, an answer or comment is needed 'right now' if it is to be useful.
- Recognize good reporting, even if the news is negative. Call reporters—or better yet, drop them a note with a copy to the editor or news director—to compliment thorough, accurate reporting.

Principle #2: **There's no place to hide.**

- Do everything you can in public. This will increase your credibility with media and public alike.
- Never try to cover up mistakes, problems, or other bad news. Too much is public information by law, too many people know, and eventually it's going to get out. Take the attitude that "the public has an obligation to help solve public school problems."
- By announcing bad news yourself, you retain some control and gain a reputation for courage and candor that will pay off. Present bad news in the most favorable light possible, of course, and mention any mitigating factors, but don't try to gloss it over.
- Keep a sense of proportion. Readers and listeners have short memories, and an isolated bad news incident will soon be forgotten. A reputation for dishonesty lives on forever.
- Nothing is ever off the record. If you say it to a reporter, you can expect to see it in print.
- Never be afraid to decline comment, but be prepared to explain why. If you don't know the answer, say so and help the reporter find the information. If the matter is properly confidential, explain why.

Principle #3: **Have a policy on dealing with news media.**

- Be sure all administrators know part of their job is to answer media questions.
- Outline what is and is not public information.
- Hire a professional public relations person if you can. If not, make sure someone has the specific responsibility to contact news media about significant developments, mail out copies of reports and documents that might be useful, and so forth.

• If you do have a public relations person, make sure he or she is fully integrated into the administrative team and fully informed of what's going on in the schools. Also, recognize that a reporter who needs specific information should be able to talk directly with the administrator who is best informed.

Some problems

Problem #1: **Our reporters aren't hostile, but they sure make a lot of mistakes.**

• Often the education reporter is the 'new kid' on the staff. Even if the reporter is experienced, there will be a lot he or she doesn't know about education. You may feel it's not your job to educate reporters; but it is if you want accurate coverage.

• Be generous with copies of reports, budgets, and other helpful documents.

• Speak and write English. Eschew obfuscation. (Say "talk to parents" not "implement conferencing procedures.")

• Hold periodic press *briefings*—not press *conferences*, which should be called sparingly to make significant announcements—but informal discussions of ongoing planning, problems, progress.

• Key administrators and a board spokesman should be available to answer reporters' questions. You might consider providing home phone numbers as well as office numbers—a good reporter won't abuse the privilege.

• Make a special effort to explain financing (and other particularly complicated topics). Consider scheduling a 'seminar' to explain the budget.

Problem #2: **We get good coverage in general, but board meetings are a problem. Reporters leave early, report only the fireworks, make mistakes.**

• Many of these problems arise from tight deadlines. Try seating a key administrator or two, as well as the public relations person, at the press table at meetings to answer questions on the spot. No matter how late the meeting ends, stick around to answer reporters' questions—those writing for a morning paper or radio newscast can't wait until morning.

• Often reporters have to cover more than one meeting in an evening. Offer to call the reporter after the meeting. Don't forget to do it.

• Send out your own report of the meeting to news media the next day.

• Include interesting presentations on important programs, plan, achievements in the meeting.

• Be sure reporters receive the agenda with all background information far enough in advance to prepare for the meeting.

• Don't let the meeting get out of control. Strike a balance between efficiency and open discussion. Don't let the meeting deteriorate into a free-for-all, don't dwell on personality conflicts among board members—nothing makes more colorful copy.

Problem #3: **They only print (or broadcast) the bad news.**

• Talk with reporters and their bossess as well. News space and air time is strictly limited and bad news generally is more dramatic than good; but if editors and news directors are made aware of the problem, they may make a special effort to get out more balanced news.

• Be aggressive—send news releases, call news conferences (but only for truly important items or you'll lose credibility), arrange media 'events' such as tours of facilities, special presentations or coffees with some top teachers to talk about teaching or learning.

• Be sure to explain why the 'good news' is significant. Don't expect reporters (their readers and listeners) to understand what test scores mean or to know that your new reading program is a major break-through.

• Be honest and open in dealing with reporters in 'bad news' situations—they'll remember it when you call to tell them something good.

• Don't rely solely on the news media for your communications. Develop and use other channels (newsletter, personal contact).

Problem #4: **Negotiations.**

• Be honest and direct; say simply, "sorry, but I can't comment because . . ." when that's the case.

• Never get hostile or berate reporters for trying to worm out information. That's their job. On the other hand, don't get cornered into saying something you shouldn't.

• Consider joint progress reports if the union is amenable. There's no better evidence that negotiations are proceeding smoothly.

• If negotiations are going badly or have broken down don't be the heavy. Don't denounce your opposition. Be reasonable and be positive.

Problem #5: **Total warfare.**

• First, make sure your own house is in order. If you don't have a policy for dealing with the media, develop one, and educate your personnel in the principles listed above.

• If past sins by the school board or administration are to blame be sure the policy addresses them. Be able to promise that, for example, you will never again hold a secret board meeting.

• Set up a meeting with news executives and reporters and hash out the problem. Explain your policy and the reasoning, discuss information disclosure laws, and the open meetings act. Ask how you can make it easier for them to cover the schools.

• Don't be hostile, but don't be defensive, either. Approach the problem as a mutual one.

• Try to get the media to 'buy into' school problems. Enlist their help in explaining school problems and policies to the community. Appeal to community pride. It might work.

Problem #6: **We tried all that and it didn't work.**

• In the rare instance where a news medium sees itself as an implacable adversary, just try to stay above the battle. Don't be drawn into the conflict. **You cannot win.**

• Redouble your efforts to get the news out in other ways. Start a newsletter (or revamp your existing one) to provide a 'mini-newspaper.' Report the problems, issues, programs, progress. Report on board meetings (warts and all). Do not attack the local media under any

circumstances. Just correct any misinformation or distortions in a factual, cool way.

- If you don't have a professional public relations person, get one. If it's war, you need a trained general.
- Make use of equal time and public service time on radio and television; but again, don't use it to attack. Just tell your story clearly and without recrimination.
- Submit letters to the editor and editorial statements to the local newspapers. If they don't use them, print them in your newsletter with a simple, unemotional explanation.
- Be especially careful in your dealings with reporters to follow the above guidelines. Be cordial, do not withhold legitimate information, be available to answer questions. Don't give a hostile reporter an excuse to do a negative story.
- Be especially careful not to say anything in public that you do not want quoted in print or over the air.

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Appendix G

Suggested Reading for School Board Members

Every board of education should build a library for its members. Here are some suggestions of publications dealing with board meetings and operations which are available from the New Jersey School Boards Association.

Basic Boardsmanship, Volume 3 of The School Board Library Series. One to five copies—$7.95 each; six or more copies—$7.25 each.

New Board Member Local Orientation Packet. $15.00 each.

Citizen Involvement in the Public Schools. One to nine copies, $2.50 each; 10 or more copies, $2.00 each.

Fundamentals of School Board Membership. First copy free. Additional copies, $2.35 each.

Handbook of Effective Board Leadership. First copy free. Additional copies, $2.35 each.

The Sunshine Law. Free.